Ontario Council on University Affairs

Tenth Annual Report March 1, 1983 to February 29, 1984

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Letter of Transmittal

Ontario
Council on
University
Affairs

416/965-5233

7th Floor
700 Bay Street
Toronto, Ontario
M5G 1Z6

February 29th, 1984

The Honourable Bette Stephenson, M.D.,
Minister of Education, Colleges & Universities,
22nd Floor, Mowat Block,
Queen's Park,
Toronto,
Ontario.

Dear Dr. Stephenson,

I respectfully submit herewith the Tenth Annual Report of the Ontario Council on University Affairs, which covers the period from March 1st, 1983 to February 29th, 1984.

Yours sincerely,

Marnie Paikin

M. Paikin
Acting-Chairman

Members and Officers of the Ontario Council on University Affairs 1983-84

Charles N. Armstrong (1985)
Ottawa

Jean-Michel Beillard (1986)
Ottawa

Charles M. Carmichael (1984)
London

Jack Cole (1985)
Willowdale

Harry Eastman (1986)
Toronto

Matthew Gaasenbeek (1985)
Toronto

B. Lynne Golding (1986)
Brampton

Philip Gordon (1986)
Don Mills

Carlton Gyles (1984)
Guelph

Jill Harris (1986)
Kingston

Elaine Herzog (1986)
St. Catharines

Maureen Lacroix (1986)
Sudbury

Jean Millar (1985)
Sioux Lookout

Marnie Paikin (1984)*
Burlington

Marilyn Pilkington (1985)
Toronto

Alanna Snell (1984)
Toronto

Robert Taylor (1985)
Islington

William T. Townshend (1984)
Kitchener

Burton C. Matthews (1985)
Chairman**
Waterloo

M. Barry Yeates
Research Officer

Brian O'Riordan
Research Officer

J. Paul Stenton
Research Officer

Susan Pape
Administrative Assistant

*Marnie Paikin assumed the role of Acting-Chairman from October 1, 1983 to February 29, 1984.

**Burton C. Matthews resigned as Chairman, September 30, 1983.

(Members' terms expire on February 28 of the year indicated in parenthesis.)

Introduction

Introduction

The Tenth Annual Report of the Ontario Council on University Affairs covers the period March 1st, 1983 to February 29th, 1984 and contains the full text of all Advisory Memoranda issued during the year. As usual, the report also contains a list of the public meetings held by Council in 1983 and the response of the Government to the recommendations made by Council.

Council's Advisory Memoranda

83-I Funding Approval for Five New Undergraduate Quasi-Professional Programs

The recent acceptance by the Minister of Colleges and Universities of the recommendation in Advisory Memorandum 82-VII, "Undergraduate Program Approvals", established for the first time procedures for the funding approval of new quasi-professional and special programs. In that memorandum, Council indicated that, prior to arriving at a funding recommendation, some new program proposals would be circulated to the Council of Ontario Universities (COU) and subsequently circulated to the provincially-assisted institutions for comment. Council indicated, however, that in most instances it "would deal with the proposal directly". Council has received several requests for funding approval of certain quasi-professional programs which are most appropriately dealt with by employing the latter procedure. This procedure should be employed because: the requests involve relatively minor changes to, or extensions of, existing programs; require little, if any, new resources; and involve minimal increases in existing enrolment levels. The proposed new programs considered in this memorandum are ones which Council has chosen to deal with directly.

After careful consideration, Council is prepared to recommend that the following programs be deemed eligible for formula support:

Honours B.A. in Music at Laurentian University
Honours Bachelor of Commerce and Economics at McMaster University
Pre-Service Teacher Education (B.Ed.), anglophone sector, including training program for the Senior Division level at the University of Ottawa
Certificate programs in Community Recreation and Recreation Resource Management at the University of Ottawa

Laurentian University currently offers a minor concentration in Music. The Honours program is being established so that students from Northeastern Ontario will have access to a full-fledged music program in that area of the province. While some new courses will be established, no additional faculty or facilities will be required. The program will be offered through Huntington College in Sudbury, which for some time has been formally cooperating with Cambrian College in the offering of Music courses. This cooperation will continue. The program is designed to provide a middle ground between the interdisciplinary thrust of other university Music programs and a professional B.Mus. program. The program should be viewed as an extension of the present course offerings in Music at Laurentian.

McMaster University currently offers three-year ordinary and four-year honours degrees in Commerce and Economics. In offering a combined Commerce and Economics degree, McMaster is formalizing present arrangements whereby many Commerce students take several Economics courses as options. This is intended as an enhanced, high-quality program, as the students enrolled will have to meet the admission requirements for the Honours B.Com. degree and the standards required to maintain registration in the Honours program in Economics. The establishment of this program will not entail any new courses or additional faculty resources. There is no planned increase in total student enrolment as there are enrolment quotas in place for the Commerce programs.

The University of Ottawa has made some revisions in its Pre-Service Teacher Education (B.Ed.) program, anglophone sector. The Ministry of Education has

approved these changes[1], and Council concurs with that Ministry's view. No additional expenditures will occur as a result of the changes, and the program appears to enjoy community support and cooperation. The Senior Division has been operated as a pilot project since 1979. An increasing student demand for the program and the development of sufficient resources and teaching expertise have been noted by Council. Further, it is Council's understanding that Ottawa has committed itself not to move into more specialized areas, involving, for instance, the teaching of commercial and technological subjects.

Currently, the University of Ottawa offers an honours program in Recreology. In addition, it now proposes to offer two certificate programs in the Recreology area. The programs will be composed of courses already offered for degree credit in the honours program. There will, therefore, be only minimal additional expenditures. Faculty numbers will not have to increase as it is not expected that enrolment will increase significantly. The certificate students will be expected to maintain the same level of performance as those students in the Honours Recreology program.

Accordingly, Council *recommends to the Minister:*

OCUA 83-1
FUNDING OF UNDERGRADUATE QUASI-PROFESSIONAL PROGRAMS BEGINNING IN 1984-85

THAT, the following programs be deemed eligible for formula support beginning in 1984-85, and that the eligible enrolment therein be included, from 1983-84 on, in the moving average for each institution:

Program	**University**
Music (B.A.)	Laurentian
Commerce and Economics (B.A.)	McMaster
Pre-Service Teacher Education, anglophone sector (B.Ed.)	Ottawa
Community Recreation (certificate)	Ottawa
Recreation Resource Management (certificate)	Ottawa

B. C. Matthews
Chairman
March 18, 1983

1. See attached Appendix A.

Appendix A

Ministry of
Colleges and
Universities

18th Floor
Mowat Block
Queen's Park
Toronto, Ontario
M7A 1L2

January 13, 1983

Dr. L.G. Bordeleau
Associate Dean & Director
Teacher Education Section
Faculty of Education
University of Ottawa
Rene-Lamoureux Hall
651 Cumberland Street
Ottawa, Ontario
K1N 6N5

Dear Dr. Bordeleau:

The proposed changes in the pre-service program in the anglophone sector have been approved.

The proposed changes in the pre-service program in the francophone sector have been approved, in principle, however I am enclosing a memo from Mr. Millette of this Branch in which two concerns are raised. I feel that it is simply a matter of clarification and I will discuss them with you in the near future.

Yours sincerely,

Dorothy H.M. Dunn
Director
Teacher Education Branch

att.

(Original letter signed by Dorothy H.M. Dunn)

83-II Graduate Program Funding – Language and Learning Problems (M.Ed.), York University and Management (Ph.D), Queen's University – New Graduate Programs Considered for Formula Funding

In this memorandum, Council offers advice on two of twenty-two new graduate programs which the Council of Ontario Universities (COU) recently advised had successfully passed academic appraisal. The two programs under consideration were referred to Council's Academic Advisory Committee for advice[1]. The other twenty programs will be reviewed following receipt of individual requests from each university for formula funding approval of their respective programs.

Language and Learning Problems (M.Ed.), York University

York University's Master of Education program in Language and Learning Problems meets all of Council's funding criteria for new graduate programs (Advisory Memorandum 77-VII), and is consistent with the aims, objectives and existing strengtns of that institution. Council examined carefully the question of whether this program should be funded even in a time of economic constraint. It also examined carefully York's request that York receive "accelerated funding of this programme equivalent to the full funding available to mature programmes (no discounting or slip year mechanisms)".[2]

Council believes that this program should be funded even in a time of economic constraint, as there is significant student and societal demand for it. Council cannot justify, however, recommending that the current allocative formula be suspended so that York could receive "full funding" for the students enrolled in the program. Institutions, before introducing new programs, should plan carefully in terms of the future financial viability of such programs – this should include an assessment of the match between enrolment levels and required resources.

Accordingly, Council *recommends to the Minister:*

OCUA 83-2
FUNDING FOR THE MASTER'S PROGRAM IN LANGUAGE AND LEARNING PROBLEMS AT YORK UNIVERSITY BEGINNING IN 1984-85

THAT the M.Ed. program in Language and Learning Problems at York University be deemed eligible for formula support beginning in 1984-85, and that eligible enrolment, from 1983-84 on, be included in the moving average for the university.

Management (Ph.D), Queen's University

The doctoral program in Management at Queen's University has fulfilled all of Council's funding criteria for new graduate programs and is consistent with the aims, objectives and existing strengths of the university. It is a program which, even in a time of economic constraint, is deserving of formula funding support, particularly because of the acute shortage of professors to teach in Business and Business-related fields.

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1. See attached appendices.
2. Submission by York University for Formula Funding of its new graduate program in Language and Learning Problems, January 1983, p. 3.

Accordingly, Council *recommends to the Minister:*

OCUA 83-3
FUNDING FOR THE DOCTORAL PROGRAM IN MANAGEMENT AT QUEEN'S UNIVERSITY BEGINNING IN 1984-85

THAT the Ph.D program in Management at Queen's University be deemed eligible for formula support beginning in 1984-85, and that eligible enrolment, from 1983-84 on, be included in the moving average for the university.

B. C. Matthews
Chairman
March 18, 1983

Appendix A

OCUA ACADEMIC ADVISORY COMMITTEE
Master's Program in Language and Learning Problems (M.Ed.), York University – New Graduate Program Considered for Formula Funding

In January 1983, York University addressed to the Ontario Council on University Affairs a request for formula funding for its Master of Education program in Language and Learning Problems. Council referred this request to its Academic Advisory Committee for advice.

The Committee considered this program on two occasions, and, in accordance with its "Terms of Reference", examined the program in light of Council's four funding criteria for new graduate programs (Advisory Memorandum 77-VII). The Committee also considered the question of institutional appropriateness, and reviewed the following documents relating to the program:

- Brief from York University on the Master's Program in Language and Learning Problems, January 13, 1983,
- Council of Ontario Universities' (COU) 1973 Discipline Assessment of Education programs,
- Calendar descriptions of the Education programs at O.I.S.E, the University of Western Ontario and the University of Toronto.

The Committee's findings are summarized below:

1. NEED

In its Discipline Assessment Report on Education of 1973, COU's Advisory Committee on Academic Planning (ACAP) noted:

> It is York's declared intention to develop its graduate programmes in Special Education. Until recently specialized training in this field was offered to teachers largely through courses offered by the Ministry. But now the Ministry has expressed a wish to delegate this important role to the universities, particularly to York, which appears determined to take this role seriously.[1]

The Minister of Education, in a letter to the President of York University, commented:

> I am pleased to note the commencement of this program, particularly in light of our recently enacted special education legislation. I recently received a letter from the Teachers' Federation, which emphasized the need for such programs in Ontario and it is encouraging to see that the university community is indeed responding to this need.[2]

The Committee is satisfied that this program will meet provincial and national needs.

2. UNIQUENESS

York University in its submission for funding noted that:

> This is the only complete graduate programme in Ontario in Learning Disabilities – only two other universities have courses in learning disabilities (Western and OISE). In each instance they are isolated courses

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1. *Perspectives and Plans for Graduate Studies, Education, 1973, Appendix A*, COU, p.A-68.
2. Letter from Dr. Bette Stephenson to Mr. Macdonald, dated May 28th, 1982.

> rather than complete programmes focussed in this area. This is the only graduate program in Hearing Impairment in the province.[3]

Council's criterion with regard to program uniqueness has been satisfied.

3. APPRAISAL
The Committee finds that the program has passed a rigorous appraisal, at which time it was not found to require improvements.

4. ENROLMENT
Enrolment in the Master of Education in Language and Learning Problems program totalled seven full-time and fifteen part-time students at its inception in 1981-82, and in 1982-83 there were eight full-time and twenty-eight part-time students. Council's enrolment criterion has, therefore, been met.

5. AIMS, OBJECTIVES AND STRENGTHS
In considering the aims, objectives and strengths of the University, the Committee noted the following excerpt from the ACAP Discipline Assessment:

> Clearly, strong commitments of support and co-operation have been received from the various Departments of the University. Also, there is a declared intention to add to the cadre of education specialists...The facilities available for the support of the proposed programmes are superior...Current library holdings, which include a full ERIC collection are impressive; budgetary allocations for further expansion are generous . . . Like undergraduate programmes, the proposed graduate programmes are to be linked in real and substantial ways, not only with other Departments of the University, but also with "the field"...York is located adjacent to a number of experimental and innovative education systems.[4]

The Committee also noted the University's B.Ed programs, and is satisfied that the University has overall strength in the fields of education and psychology.

6. FUNDING
The Committee, therefore, recommends to Council that:

> the Master of Education program in Language and Learning Problems at York University should be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
March 4, 1983

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3. Submission by York University for Formula Funding of its new graduate program in Language and Learning Problems, January 1983, p. 1.
4. *Perspectives and Plans for Graduate Studies, Education, 1973*, COU, pp. 67-68.

Appendix B

OCUA ACADEMIC ADVISORY COMMITTEE
Doctoral Program in Management (Ph.D), Queen's University
– New Graduate Program Considered for Formula Funding

In January of 1983, Queen's University formally requested that Council consider recommending for formula funding support its Ph.D program in Management. Council subsequently referred the program to this advisory committee. In Advisory Memorandum 78-III, Council postponed making any recommendation on any of three new doctoral programs in Business until such time as it had received a report from the Council of Ontario Universities (COU) "regarding the plans for doctoral studies in Business in Ontario and how these plans fit in with the objectives for the first quinquennium set out by Council in Advisory Memorandum 77-VII". COU was unable to submit such a report, and it was agreed, after the abandonment of the sectoral approach to graduate planning, that the individual institutions could forward their respective doctoral programs in Business directly to Council for consideration.

The Committee met on two occasions to consider the Queen's program in Management. It also considered the question of whether to review the Queen's program at the same time as the new programs at York and McMaster. The Committee decided against this approach since Queen's had so closely adhered to COU's recommendations concerning the development of their new program in Management. York and McMaster universities have not engaged in the kind of joint planning and development which was recommended concerning their programs. It would, therefore, appear appropriate to review these programs together, as they are so closely linked in COU's 1974 report. However, in the Committee's judgement, the issue of the program at Queen's is clearly separable from a review of the other two proposed programs.

The Committee considered the program in light of Council's funding criteria for new graduate programs (Advisory Memorandum 77-VII), and examined the question of whether the program was consistent with the "aims, objectives and existing strengths of the University". Several documents relating to the program were reviewed including:

- OCUA Advisory Memorandum 78-III,
- Calendar description of the program,
- sections of COU's annual compilation of graduate program macro-indicators,
- COU's 1974 Discipline Assessment of Administration, Business and Management Science,
- *Request for Formula Funding Support for the Ph.D Program in Management at Queen's University,* Queen's University, January 10th, 1983.

The Committee's findings with regard to the program are summarized below:

1. NEED

The Deans of Business Schools have estimated that, though there were some 200 vacancies for academic positions in Canadian Business Schools in 1981, only 20 students, nation-wide, enrolled in the existing funded programs, would graduate with Ph.Ds in Business in 1981.

With increasing enrolment in Business and Business-related subjects at the master's and undergraduate levels, the need for qualified academics is most urgent if the quality of the programs and the quality of the graduates of the programs are to be maintained. We are also convinced that there are a number of openings in

business and government for graduates of this type of program.

There is also an evident student demand for the program as there were 292 enquiries for 1982-83 and 39 formal applications for the program at Queen's.

2. UNIQUENESS

The Doctoral program in Business at Queen's is distinctive in that, as noted and recommended by the COU Discipline Assessment of 1974, the program is primarily research-oriented, with very strong, formal links to the Department of Economics. The program emphasizes the academic research aspect of Business rather than the management professional aspect. The Committee is satisfied that the program is sufficiently different from existing programs to meet Council's funding criterion of uniqueness.

3. APPRAISAL

The program passed a rigorous appraisal and no improvements were required at the time of appraisal.

4. ENROLMENT

In the current year, there are eighteen full-time students enrolled in the program and, therefore, Council's enrolment criterion has been satisfied.

5.AIMS, OBJECTIVES, STRENGTHS

Queen's University has well-established research strengths in the Social Sciences in general, and specifically in Business. The university has followed a deliberate policy of recruiting faculty with "strong records and interests in research"[1] in Business. The doctoral program in Management in the School of Business clearly builds upon established strengths in Business programs at the undergraduate and master's levels. There are formal links with the Department of Economics and also links with other research-oriented departments and institutes, such as Mathematics and Statistics, the Industrial Relations Centre, Psychology, Political Studies, and the Centre for Resource Studies.

The Committee believes that the new program is consistent with the aims, objectives and existing strengths of Queen's University.

6. FUNDING:

The Committee, therefore, recommends that:

> the Queen's University Ph.D program in Management should be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
March 4, 1983

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1. *Request for Formula Funding Support for the Ph.D Program in Management at Queen's University*, Queen's University, January 20, 1983, p.6.

83-III The Ontario Graduate Scholarship Program, 1984–85

In this memorandum Council renders its advice for 1984-85 on the value of the Ontario Graduate Scholarship (OGS) stipend, the number of stipends to be awarded and associated matters.

Scholarship Eligibility
Council must once again bring to the attention of the Minister its long-standing position that the OGS competition:

> ...be open equally to Canadian citizens and to persons who had landed immigrant status as of the official annual closing date for applications, it being understood that this provision applies similarly to institutional nominees.[1]

The current rules for the OGS program specify that an applicant for an award in the open or institutional categories must be a Canadian citizen or be a landed immigrant for at least twelve months prior to the deadline for submission of applications. Council believes that a more appropriate regulation would be one that simply required all applicants to be permanent residents as of the deadline for submission of applications. This is, for instance, the requirement for eligibility in the competition for postgraduate scholarships awarded by the Natural Sciences and Engineering Research Council (NSERC) and the Medical Research Council (MRC). Highly qualified applicants should not be excluded from the open competition or institutional awards competition simply because they have been landed immigrants for less than one year.

Accordingly, Council *recommends to the Minister:*

OCUA 83-4
ONTARIO GRADUATE SCHOLARSHIP PROGRAM ELIGIBILITY

THAT, the Ontario Graduate Scholarships be open equally to Canadian citizens and to persons who hold landed immigrant status as of the official annual closing date for applications, it being understood that this provision would apply similarly to institutional nominees.

Scholarship Stipend
In reply to Advisory Memorandum 82-IV, the Minister, on April 15, 1983, announced that the value of the OGS stipend for 1983-84 would increase from the 1982-83 level of $2,090 per term to a level of $2,195 per term. This represents a 5% increase in the value of the award.

NSERC increased the value of its award for 1983-84 by 5.7% and the Social Sciences and Humanities Research Council (SSHRC) increased the value of its fellowship awards for 1983-84 by 11.1% over the 1982-83 value. In the year that Council first submitted advice on the value of the OGS, 1974-75, the OGS stipend was approximately 76% of the value of an NSERC award and 85% of the value of a SSHRC award. By contrast, for 1983-84, the OGS stipend is 59.3% of the value of an NSERC award and 61.0% of the value of a SSHRC award.

In Table I, Council presents a comparison of the values of the OGS, NSERC and SSHRC awards since the inception of the OGS program. These comparisons are relevant and appropriate ones as the NSERC and SSHRC award programs are, to a

1. OCUA Recommendations 75-3, 76-2, 77-1, 78-4

Table I

Comparative Scholarship Stipends

	OGS	NSERC PGS Stipends[1]	SSHRC Stipends (1st & 2nd PhD)
1974–75	$3,400[2]	$ 4,500	$ 4,000
1975–76	$3,400[2]	$ 5,000	$ 5,000
1976–77	$3,750	$ 5,520	$ 5,500
1977–78	$4,350	$ 6,000	$ 6,000
1978–79	$4,500	$ 6,360	$ 6,360
1979–80	$4,800	$ 7,000	$ 6,750
1980–81	$4,890	$ 8,500	$ 7,860
1981–82	$5,700	$ 9,350	$ 8,760
1982–83	$6,270	$10,500	$ 9,720
1983–84	$6,585	$11,100	$10,800
% increase 1983-84 over 1974-75	93.7	146.6	170.0

1. NSERC post-graduate scholarship (PGS) values are those that were in effect in the Fall of each academic year
2. Adjusted to take account of the integration of fees into the stipend in 1976-77

large extent, the only other major sources of scholarship support for outstanding Ontario graduate students. Council continues to support the concept of the OGS as a prestigious academic award that should be making a significant contribution to the fostering of outstanding graduate scholarship in Ontario.

Table II

Comparative Scholarship Stipends
(In Constant Dollars 1974-75 = 100.0)

	OGS	NSERC PGS Stipends	SSHRC Stipends (1st & 2nd PhD)
1974–75	$3,400	$4,500	$4,000
1975–76	$3,094	$4,550	$4,550
1976–77	$3,191	$4,698	$4,681
1977–78	$3,409	$4,702	$4,702
1978–79	$3,233	$4,569	$4,569
1979–80	$3,158	$4,605	$4,441
1980–81	$2,893	$5,030	$4,651
1981–82	$3,010	$4,937	$4,625
1982–83	$3,026	$5,068	$4,691
1983–84	$2,960	$4,989	$4,854
% change 1983-84 over 1974-75	−12.9	+10.9	+21.4

Advisory Memorandum 82-IV contained an outline of the effects that inflation, as measured by the Consumer Price Index, has had on the real dollar values of the OGS, NSERC and SSHRC awards. Table II is an updating of this information. It incorporates the actual rate of inflation for 1982-83 and an estimated rate of inflation for 1983-84. The table shows that given the 5% increase in the value of the OGS stipend there has been a decrease in the real value of the award over 1982-83. The 1983-84 value of the award in 1974-75 constant dollars is 12.9% below the actual 1974-75 value. By comparison, the real dollar values of the NSERC and SSHRC awards for 1983-84 are, respectively, 10.9% and 21.4% higher than their 1974-75 values.

Number of Awards

Table III provides a revised summary, by category, on the number and distribution of OGS awards.

Table III

Number of OGS Awards
(by category)

	Open	Institutional	Visa/LI	Total
1974–75	850	150	(Quota)[1]	1,000
1975–76	850	150	(Quota)[1]	1,000
1976–77	850	150	(Quota)[1]	1,000
1977–78	850	45	50	945
1978–79	1,150	45	50	1,200
1979–80	1,095	45	60	1,200
1980–81	1,095	45	60	1,200
1981–82	910	40	50	1,000
1982–83	1,095	45	60	1,200
1983–84	1,095	45	60	1,200

1 Up to 10% of the awards could be allocated to landed immigrants or holders of student visas

In deciding on the appropriate recommended value for the OGS stipend for 1984-85, Council has taken all of the above factors, comparisons and situations into account. As Council accords the highest priority to the maintenance of the value of the stipend, the real value of the award in 1984-85 should at least approximate the 1983-84 value. Council's projected inflation factor for 1984-85 is 5.5%, and, therefore, the stipend should be increased to $6,947, or $2,316 per term.

Accordingly, Council *recommends to the Minister:*

OCUA 83-5
ONTARIO GRADUATE SCHOLARSHIP STIPENDS 1984-85

THAT, in 1984-85, Ontario Graduate Scholarships carry a minimum stipend value of $6,947, or $2,316 per term.

For reasons first outlined in Advisory Memorandum 76-II, Council continues to advocate the allocation of institutional awards to those five universities not offering doctoral programs, but feels that there should be an increase in the number of awards in this category to enhance the quality of scholarship activity within these institutions.

Accordingly, Council *recommends to the Minister:*

OCUA 83-6
INSTITUTIONAL AWARDS TO UNIVERSITIES WITHOUT DOCTORAL PROGRAMS

THAT up to 55 scholarships (11 per university) be institutional awards in 1984-85 for those universities *without doctoral programs.*

Since 1977-78 a small portion of the OGS stipends have been reserved exclusively for landed immigrants who have resided in Ontario for less than a year and for persons on student visas. As indicated above, in last year's competition there were 944 applications for the 60 scholarships made available in this category, or a ratio of approximately one award for every 16 applicants. This compares with a ratio of one award for every 6 applicants in the Open and Institutional Competition category. Council believes that it would be desirable to decrease somewhat the differential between these two ratios, and accordingly, Council *recommends to the Minister:*

OCUA 83-7
ONTARIO GRADUATE SCHOLARSHIPS TO PERSONS ON STUDENT VISAS

THAT up to 70 scholarships be reserved for persons who at the time of application are student visa holders.

While Council places the highest priority on maintaining the real value of the stipend, it must draw attention to the fact that, despite substantial increases in applications in all fields, there has been no increase in the number of awards since 1978-79. Council, therefore, once again strongly urges that serious consideration be given to increasing the total number of awards available. Overall, at least 200 more awards could be offered. If the funds are not available for such an increase, then the number of awards should be determined in the manner illustrated in Table IV of this memorandum. In view of these considerations, Council requests that, for 1984-85, the increase in funding for the Ontario Graduate Scholarship program be within the percentage range displayed in Table IV.

Accordingly, Council *recommends to the Minister:*

OCUA 83-8
NUMBER OF ONTARIO GRADUATE SCHOLARSHIP AWARDS IN 1984-85

THAT, consistent with the priority attached by Council to a 1984-85 stipend value of $6,947, the number of Ontario Graduate Scholarships available for:

a) open competition,
b) institutional awards at universities not having any doctoral programs, and
c) visa students

be scaled down as shown in Table IV so as to maintain the recommended value of the award at $6,947.

B. C. Matthews
Chairman
June 24, 1983

Table IV

Number and Composition of OGS Awards for 1984-85 under Alternative Funding Increases

Percent Increases in Funding for 1984–85 over 1983–84 %	Total Awards Possible at a Stipend of $2,316 per term.[1] (No.)	Awards Available for Open Competition (No.)	Awards Available for Visa Students and Recent Landed Immigrants (No.)	Inst. Awards for Equal Dist. by Quota among Univ. with no Doctoral Programs (No.)
5.5[2]	1,200	1,095	60	45
6	1,205	1,100	60	45
7	1,217	1,111	61	46
8	1,228	1,121	61	46
9	1,240	1,132	62	46
10	1,251	1,142	62	47
11	1,263	1,153	63	47
12	1,274	1,162	64	48
13	1,285	1,173	64	48
14	1,297	1,183	65	49
15	1,308	1,194	65	49
16	1,319	1,204	66	49
17	1,331	1,214	67	50
18	1,342	1,225	67	50
19	1,354	1,235	68	51
20	1,365	1,246	68	51
21	1,376	1,256	68	52
22	1,388	1,266	69	53
23	1,400	1,275	70	55

1. Assuming that there is no change in the mix of the two-term and three-term awards.
2. The recommended stipend of $6,947 for 1984-85 is approximately 5.5% greater than the stipend for 1983-84. Therefore, the OGS funding for 1984-85 would have to increase by approximately 5.5% to maintain the number of awards at 1,200, assuming that there is no change in the mix of two-term and three-term awards.

83-IV Government Support of the University System in 1984-85

The funding recommendations in this Memorandum are estimated to be the minimum necessary, given the increased enrolment projected for 1984-85, to allow the institutions to maintain the level of services provided in 1983-84. Council's recommendations covering its basic funding objectives do not include the amount (or any portion of the amount) that would be required to recoup the shortfall in funding accumulated during recent years and are based solely on the present (1983-84) levels of funding and services. Council feels strongly that there should be no further erosion of the level of services in 1984-85 and that the funding increase in 1984-85 be as recommended herein in order to ensure that this will be the case.

Government Support in Perspective

In *A Financial Analysis of the Ontario University System – 1982*, Council pointed out that during the period in which Council's funding advice has not been accepted (1978-79 to 1982-83), the universities' share of total Government budgetary expenditures (excluding debt servicing) declined by about 15%, while university enrolment increased by about 10%. For 1983-84, however, it is projected that the universities' share of total budgetary expenditure will increase. It has been announced that university funding will increase by 8.6% in 1983-84, while total Government budgetary expenditures (excluding debt servicing) are projected to increase by 6.1%.[1] It should be noted, however, that if the universities' share of total Government budgetary expenditures (excluding debt servicing) had been maintained at the 1977-78 level, the last year Council's funding advice was accepted, the universities would have received an additional $195 million in operating grants in 1983-84 alone.

In Advisory Memorandum 82-XIV, Council estimated that Government support of the Ontario university system would fall $8.9 million short of meeting Council's basic funding objectives for 1983-84. Council has recalculated the cost of its basic funding objectives using current estimates of inflation and enrolment change and the actual revenue available for 1983-84. Incorporated in these recalculations is a reduction in Council's estimates of the percentage increase in the Consumer Price Index and the Ontario University Non-Salary Price Index from 9.0% and 11.7% to 6.0% and 7.8% respectively, along with an increase of $6.7 million in estimated formula fee revenue and reductions in estimated other fee revenue and other revenue of $1.7 million and $3.2 million respectively. Council now estimates that Government support will be about $1.3 million short of the university system's basic funding requirements in 1983-84. Council is encouraged by the fact that Government came very close to meeting the basic funding requirements for 1983-84.[2]

Council does not use interprovincial comparisons as a basis for its funding advice. However, it does note that during the seven-year period 1974-75 to 1980-81, for which comparable data are available, Ontario dropped from seventh to tenth place among the provinces in terms of the level of provincial grants per full-time equivalent (FTE) student. Council has calculated that if Ontario universities had been funded at a level of operating grants per FTE student equal to the weighted average level of the other nine provinces, Government would have provided $264 million more that it did in 1980-81.

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1. 1.1% of this 8.6% increase in university operating grants represents a special one-time grant for equipment and library acquisitions.

2. In accordance with the Minister's acceptance of OCUA recommendation 79-12, revenue received from additional optional fees is not taken into consideration in this memorandum. See Appendix A for a description of the shortfall calculation.

Calculation of Funding Requirements for 1984-85

Having, in the preceding section, placed the existing level of government support in perspective, Council now proceeds to calculate the requirements for 1984-85.

a) Basic Funding Objectives for 1984-85

Council's funding objectives for 1984-85 are: (1) to offset inflationary trends, (2) to maintain levels of service, and (3) to adjust for predicted enrolment change.

b) Cost of Basic Funding Objectives for 1984-85

The method for costing Council's basic funding objectives for 1984-85 and the factors used to calculate the funds required are outlined below. Table I documents the results. The methodology is similar to that used in previous years.

(i) The 1983-84 Base (Column 1)

Council's estimate of the financial requirements of the Ontario university system for 1984-85 is calculated by escalating the universities' expenditures in 1983-84 by Council's estimate of the increase in the costs of maintaining the same level of service. In calculating the 1983-84 expenditure base, it is assumed that expenditures in 1983-84 are equal to estimated revenues. As a result, the base does not incorporate the 1983-84 funding shortfall identified in Appendix A.

On this basis, Council estimates that the 1983-84 base of operating revenue and expenditures of all institutions (the fifteen provincially-assisted universities, the affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College) will be $1,426.1 million. These base expenditures are apportioned according to their corresponding share in the universities' budgets: 80.7% for salaries and fringe benefits and 19.3% for non-salary items.

(ii) Increases in Costs due to Inflation (Column 2)

Council has reviewed forecasts made by several competent authorities of the increase in the Consumer Price Index (CPI) for 1984-85. These projections ranged from 4.3% to 6.3%. Council has used the average of these projections, 5.5%, as its estimate of the increase in CPI.

Normally, Council has used its estimate of the increase in CPI as its salary inflation factor for the entire fiscal year in question. However, in revising its funding advice for 1983-84 to reflect the effects of the *Inflation Restraint Act, 1982* on university system costs (Advisory Memorandum 82-IIIA), Council adjusted its advice to take into account differences between the universities' fiscal year and salary contract periods. It was estimated that, on average, the 5% wage scale guideline imposed under the *Inflation Restraint Act, 1982* would be in effect for 10.5 months of the 1983-84 university fiscal year. The remaining 1.5 months were covered by existing 1982-83 salary contracts which overlapped into the 1983-84 fiscal year.

For the 1984-85 fiscal year, Council believes that, in order to be consistent with its 1983-84 funding advice, it must again take into account differences between the universities' fiscal year and salary contract period. Hence, Council's salary inflation factor of 5.4% is calculated by: (1) applying the 5% wage scale guideline for 1.5 months of the 1984-85 fiscal year, and (2) applying the 5.5% estimate of the increase in CPI for the remaining 10.5 months of the 1984-85 fiscal year. This 5.4% inflation factor is applied to the salaries and benefits portion of the base.[3]

For several years, increases in the prices of non-salary items purchased by universities have exceeded increases in CPI. The annual increase in the Ontario

3. This increase for salaries and benefits is estimated to be the amount required to maintain base salaries at 1983-84 levels. The increase contains no "catch-up" component.

Table I

The Cost of Basic Funding Objectives for 1984-85
($ million)

	1	2	3	4	5	6	7
	1983-84 Base	Inflationary Trend Costs	Service Level Costs	Efficiency/ Rationalization	Predicted Enrolment Change	Stabilization Factor	Cost of Basic Objectives
Expenditures							
Salaries and Fringe Benefits	1,150.9	62.6	18.2	(6.2)	22.1	(11.0)	1,236.6
Non-Salary	275.2	19.0	0.0	(1.5)	5.3	(2.7)	295.3
	1,426.1	81.6	18.2	(7.7)	27.4	(13.7)	1,531.9

Notes:

1. Percentage change factors for each column of the table are as follows:

	Salaries and Fringe Benefits	Non-Salary
Column 2:	+ 5.4%	+ 6.9%
Column 3:	+ 1.5%	0.0%
Column 4:	- 0.5%	- 0.5%
Column 5:	+ 1.8%	+ 1.8%
Column 6:	- 50.0% of Column 5	- 50.0% of Column 5

2. These factors, except for column 6, are applied to the cumulative total of the previous columns.

University Non-Salary Price Index (OUNSPI) averaged 25.3% higher than the annual increase in CPI during the period 1975-76 to 1981-82. Council's 1984-85 non-salary inflation factor is derived by increasing the projected 5.5% increase in CPI by the average differential between the increase in OUNSPI and CPI for the period cited. This yields a value of 6.9%.

(iii) Increase in Costs of Maintaining Existing Service Levels (Column 3)
In its advice each year Council has identified, and made provision for, costs of maintaining existing levels of service which are not related to inflation. In recent years, Council has made provision for only one component of these additional costs in its cost of basic objectives, the net cost of providing for progress-through-the-ranks (PTR) for faculty and non-academic staff. This net cost arises from the uneven age distribution of the faculty and non-faculty complement, where the number of people retiring (with higher salaries) and being replaced by younger people (with lower salaries), is not sufficient to provide the total funds required for the normal progress of continuing faculty and staff.

Prior to 1980-81, Council also included under its provison for existing service level costs an allowance for furniture and equipment replacement. Council has subsequently removed this non-salary service level costs factor from its funding model and has made a separate provision for the restoration of equipment and library collections. Council feels that it must continue to recommend a level of support which will, in time, lead to the restoration of the levels of service in non-salary expenditure areas to an appropriate level, and not recommend funds sufficient only to maintain the 1983-84 level (see section entitled *Equipment and Library Needs*).

It is becoming increasingly evident to Council, through its discussions with the universities at its Spring hearings, that the level of service provided by Ontario universities has been eroded in recent years and will be in further jeopardy in the near future. Measuring and costing such an erosion is extremely difficult. However, Council believes one telling indicator is student/faculty ratios which have increased by over 15% in the past four years from about 13.8:1 to 15.9:1. This increase in instruction load has tended to reduce the amount of time available for research and scholarly activities. Research is central to the mission of any university. Research projects carried out in Ontario universities have made important contributions to the economic and social well-being of Ontario and Canada.

Council's 1984-85 provision for meeting the costs of maintaining levels of service is an estimate of net cost of providing for PTR for faculty and staff. The faculty manpower flow model developed by the Council of Ontario Universities predicts that, for the existing age distribution of faculty, under normal salary conditions (i.e., without the wage restraint program), the net costs of providing for PTR in 1984-85 would be 1.7% of salaries and benefits. However, similar to the salary scale calculations outlined in (ii) above, this estimate applies to only the last 10.5 months of the 1984-85 fiscal year. The PTR costs in the first 1.5 months of the 1984-85 fiscal year are affected by the *Inflation Restraint Act, 1982*, which does not allow any increase in salaries to recognize PTR for faculty with salaries equal to or greater than $35,000. If the faculty manpower flow model is adjusted to reflect this, on a 12-month basis, the estimated net cost of providing for faculty PTR in 1984-85 would be -0.7% of faculty salaries and benefits. Therefore, Council's estimate of net faculty PTR costs for 1984-85 of 1.4% is calculated by: (1) applying the -0.7% wage restraint faculty PTR cost estimate for 1.5 months of 1984-85 fiscal year; and (2) applying the 1.7% estimate of net faculty PTR costs for the remaining 10.5 months of 1984-85.

Council continues to use the faculty manpower flow model's estimate of net PTR costs (1.7%) as a proxy for the net costs of providing for career progress for non-academic staff. Data on costs of career progress for non-academic staff are not

sufficiently reliable to derive an acceptable estimate of net PTR costs for this group. In its revised 1983-84 funding advice (Advisory Memorandum 82-IIIA), Council noted that Government's wage restraint program does not limit PTR salary increases for the majority of non-academic staff.The savings experienced as a result of not having to provide PTR to the remaining non-academic staff, earning over $35,000 in salary, are expected to be more than offset by the provision under the restraint legislation to provide individuals earning less than $20,000 a salary scale increase of greater than 5%. Consequently, Council uses 1.7% as the cost of providing for career progress in the non-academic staff complement in 1984-85.

Applying the 1.4% PTR factor to that portion of total salary costs attributable to faculty (55%) and the 1.7% PTR factor to that portion attributable to non-academic staff (45%) results in an estimated net cost increase of 1.5% in 1984-85 for career progress of faculty and staff.

(iv) Cost Reduction due to Efficiency/Rationalization (Column 4)

For several years, Council has reduced its total funding estimate by a factor of 0.5% to 1.5% in the belief that institutions can reduce expenditures to some extent, while retaining levels of service by improved efficiency and rationalization of their program offerings. In preparing its 1984-85 funding advice, Council discussed removing this factor from its funding model. It has been argued for a number of years by the Council of Ontario Universities and others that any of the cost reductions that can be achieved by increasing efficiency/rationalization must be used to offset the backlog of major problems arising from prolonged underfunding. It is further argued that the effects of the efficiency/rationalization factor are compounded annually at a greater rate than intended by Council by ignoring the effects of previous years' shortfalls in funding on the base (used in Council's funding model). While Council acknowledges these arguments, it continues to believe that the university system must continue to search for ways to increase efficiency. Council is, therefore, continuing to use an efficiency/rationalization factor of -0.5% in calculating the funding requirements for 1984-85.

(v) Projected Increase in Enrolment (Column 5)

In 1982-83, total university enrolment increased by about 5.5% and is estimated by the Council of Ontario Universities' Committee on Enrolment Statistics and Projections to increase in 1983-84 by a further 2.7% to 3.8%. Council has considered this forecast together with: (1) the most recent data on the number of applications and applicants for first year admission in the Fall of 1983; (2) trends in the size of the cohort (18-24 years of age) from which universities will draw the majority of students; (3) recent trends in participation rates; and (4) recent data on retention rates and the consequent potential enrolment increases in upper years in 1984-85. On the basis of these data, Council estimates that enrolment in the university system in Ontario will increase by 1.8% in 1984-85 over 1983-84.

(vi) Funding Stabilization Factor (Column 6)

In order to dampen the effect of enrolment change in any one year on the level of funding, Council has, for a number of years, discounted by 50% the projected growth or decline in enrolment used in its funding advice. This discounting factor is applied to the projected enrolment increase in 1984-85.

(vii) Total Cost of Basic Funding Objectives (Column 7)

The total cost of basic funding objectives in Column 7 of Table 1 is the sum of the first six columns in the table. The resulting total of $1,531.9 million is Council's estimate of the total cost of basic funding objectives for 1984-85 — a 7.4% increase over the 1983-84 estimated expenditure base.

Estimated Government Grants Required to meet the Basic Funding Objectives
Council estimates that the other income accruing to the university system in 1984-85, in addition to Government grants, will be:

(1) from other sources, $51.9 million, the same as the amount projected for 1983-84;
(2) from fees other than tuition fees, $12.8 million, the 1983-84 projection adjusted for the projected 1.8% increase in enrolment in 1984-85; and
(3) from formula tuition fees, $258.2 million, at 1983-84 rates including an adjustment for the predicted 1.8% increase in enrolment in 1984-85. Consistent with Council's advice on formula fee rates in Advisory Memorandum 79-IV, it is assumed that formula fee rates will increase by the same percentage as operating grants. Therefore, formula fee rates should be increased by 7.4% in 1984-85 yielding an additional $19.1 million for a total of $277.3 million in formula fee revenue in 1984-85.

As shown in Table II, Council estimates that of the total $1,531.9 million required, $1,189.9 million must be made available as Government operating grants to meet the costs of Council's basic funding objectives in 1984-85. This is a 7.4% increase over the amount provided for 1983-84.

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council:*

OCUA 83-9
GOVERNMENT OPERATING GRANTS FOR 1984-85 TO MEET THE COSTS OF COUNCIL'S BASIC OBJECTIVES IN FUNDING PROVINCIALLY-ASSISTED UNIVERSITIES AND THEIR AFFILIATED COLLEGES, RYERSON POLYTECHNICAL INSTITUTE, THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION, THE ONTARIO COLLEGE OF ART AND DOMINICAN COLLEGE

THAT $1,189.9 million in operating grants be made available in 1984-85 to the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College.

OCUA 83-10
FORMULA FEE RATES FOR 1984-85 TO MEET THE COSTS OF COUNCIL'S BASIC OBJECTIVES

THAT formula fee rates for 1984-85 be increased by the same percentage as operating grants, namely 7.4%, to provide $277.3 million in formula fee revenue to the provincially assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College, and that this increase in formula fee rates be fully reflected in the Ontario Student Assistance Program.

Estimated Costs of the Bar Admission Course
As in previous years, Council's estimate of the costs of basic funding objectives does not include the cost of the grant-in-aid for the Bar Admission Course of the Law Society of Upper Canada. Council has consistently recommended that Government cover the cost of the grant-in-aid for the Bar Admission Course separately from its

Table II

Cost to Government of Meeting Council's Basic Funding Objectives for 1984–85: Provincially-Assisted Universities, Affiliated Colleges, Ryerson, OISE, OCA and Dominican College
($ million)

1.	Cost of Basic Funding Objectives	1,531.9	
2.	Other Revenue	(51.9)	
3.	Other Fee Revenue	(12.8)	
4.	Total Formula Fees and Government Operating Grants required to meet Council's Basic Funding Objectives	1,467.2	
5.	Formula Fee Revenue at 1983-84 rates and the predicted 1984-85 level of enrolment	258.2	
6.	1983-84 Operating Grants	1,108.0	
7.	1983-84 Operating Grants and enrolment–adjusted Formula Fee Revenue (line 5 + line 6)	1,366.2	
8.	Percentage increase in Operating Grants and Formula Fee Revenue $\frac{\text{(line 4 – line 7)}}{\text{line 7}} \times 100$		7.4%
9.	Additional Formula Fee Revenue generated by a 7.4% increase in formula fee rates	19.1	
10.	Total Formula Fee Revenue (line 5 + line 9)	275.3	
11.	Cost to Government of Basic Funding Objectives (line 6 increased by 7.4%)	1,189.9	

provision for Council's basic funding objectives. This recommendation has not been met. Council continues to believe that such a provision is necessary and desirable.

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council:*

OCUA 83-11
FUNDING FOR 1984-85 FOR THE BAR ADMISSION COURSE

THAT $0.74 million be provided in 1984-85 for a grant-in-aid for the Bar Admission Course.

Estimated Incremental Costs of Bilingualism

In Advisory Memorandum 77-VI, Council reported on the results of its study intended

> ...to identify the additional costs associated with bilingual activities, to outline a standard costing method that could be applied to all designated bilingual institutions, and to determine the amount of these costs.[4]

Using data provided by the bilingual institutions (University of Ottawa, Laurentian University, Glendon College, Hearst College, University of Sudbury and Saint Paul University) for 1976-77, Council's intention was that the results of the study

4. Ontario Council on University Affairs, *Fourth Annual Report*, 1977–78, p. 46.

> ...should form the basis for bilingualism grant allocation for a 4 to 6 year period. At the end of this period bilingualism costs would again be reviewed to determine the appropriate level and distribution of grants for a subsequent period.[5]

As a result of a phase-in of additional support for bilingualism costs, and a shortfall in Government support for those costs, during the period 1978-79 to 1980-81 total grants were allocated to institutions with one-half based on the distribution of the previous year's bilingualism grants and one-half based on the 1976-77 cost study. For 1981-82, however, Council completed the phasing in of the distribution of grants announced in Advisory Memorandum 77-VI and recommended the allocation of bilingualism grants according to the incremental costs identified by Council's cost study. The cost study results have formed the basis for Council's recommendations on bilingualism grants for 1982-83 and 1983-84.

In Advisory Memorandum 81-IX, Council noted its promise to review bilingualism costs after a period of four to six years (from the original 1976-77 cost study) and indicated that it intended "to conduct such a review in the upcoming year (1982-83) using 1981-82 cost data".[6] Subsequently, Council circulated a draft methodology for the study and invited submissions from the six bilingual institutions on possible amendments. Then, in October 1982, a hearing was held between Council's Bilingualism Costs Committee and the representatives of the bilingual institutions to discuss the comments and suggestions received. A final methodology was then distributed in November of 1982 and institutions submitted relevant data in January of 1983.

During the past few months, Council has, in consultation with the bilingual institutions, been clarifying and studying the incremental costs of existing bilingualism programs. The preliminary results indicate that, in recent years, bilingualism grants have not been sufficient to meet these costs. Although Council's examination of the incremental costs is not yet complete, the gap between actual grants for 1983-84 and the level of support required (on the basis of the cost study) is at least $4 million.

Accordingly, Council recommends to the *Minister and Lieutenant Governor in Council:*

> *OCUA 83-12*
> *ADDITIONAL FUNDING FOR 1984-85 FOR EXISTING BILINGUALISM PROGRAMS*
>
> *THAT* $4.0 million be provided in 1984-85 as an initial step in recognition of the documented incremental costs of existing bilingualism programs.

Equipment and Library Needs

For 1983-84, Council recommended that $12.0 million be provided in recognition of the special need for equipment and library acquisitions. In her letter of February 15, 1983, the Minister of Colleges and Universities responded to this recommendation by announcing that $12.0 million would be provided "as a special one-time grant toward institutional expenditures on equipment for use in teaching undergraduates and on library equipment and acquisitions". Council welcomes the provision of this special grant. However, Council feels that there are major ongoing needs in this area and that a "one-time grant" of the magnitude provided will be insufficient to meet these needs.

Council's funding provisions for non-salary items and, in particular, for expenditures on equipment and library acquisitions were not intended as one-time grants.

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5. *Ibid.*, p. 47.
6. Ontario Council on University Affairs, *Eighth Annual Report*, 1981-82, p. 121.

Indeed, as pointed out above, for a number of years (1976-77 to 1979-80), Council's funding advice included in the calculation of the cost of basic funding objectives a "service level costs" factor to reflect the annual costs of maintaining and replacing equipment and furniture. In Advisory Memorandum 79-II, Council decided to delete this factor from its determination of the costs of basic funding objectives for 1980-81 in favour of a separate funding recommendation for these expenditures as a first step toward providing sufficient funds to restore equipment and library collections. Since that time, Council has annually recommended separate funding for equipment and library acquisitions and, consequently, has not included a non-salary service level costs factor in its basic funding model.

Council's continued concern about the need to restore equipment and library collections has led it to recommend additional funds for 1984-85. In making this recommendation, Council must make it clear that the provision of this level of funding will not restore equipment inventories and library collections to adequate levels. It will, however, relieve some of the pressures experienced in this area of expenditures in recent years. Council will continue to monitor the situation, and hopes that in the near future it will find it appropriate to recommend a level of funding that provides only for current maintenance and replacement of existing equipment and library allocations (as it did for 1976-77 to 1979-80).

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council:*

> *OCUA 83-13*
> *EQUIPMENT AND LIBRARY FUNDING FOR 1984-85*
>
> *THAT*, in addition to the amounts recommended in 83-9, 83-10 and 83-11, $12.0 million be provided in 1984-85 in recognition of the special need for equipment and library acquisitions.

Capital Assistance

On June 17, 1983, the Minister of Colleges and Universities announced that $13.5 million will be provided in capital grants to Ontario universities for 1983-84. Aside from funds for carry-over projects, these funds "have been given almost exclusively to projects that will upgrade existing facilities to meet structural, fire, occupational health and safety code requirements"[7] at the universities. Only about $5.4 million of the above amount is allocated toward projects covered by Council's 1983-84 capital funding recommendation for new major repairs, renovations and replacement projects of $25.3 million.

Council welcomes the Treasurer's announcement, in his May 10, 1983 Budget, of a new accelerated capital works program to be coordinated by the Board of Industrial Leadership and Development. This job initiative "is targetted primarily to regions of the province with higher levels of unemployment" and will provide $17.2 million to the universities over two years.[8] Of this amount $9.0 million will be provided in 1983-84. However, the total combined allocation ($22.5 million) from the BILD accelerated capital program and the regular Ministry of Colleges and Universities capital grants program falls short of Council's recommendation ($25.3 million) which pertains only to new major repairs, renovations and replacement projects. Council reiterates its conviction that continued capital underfunding will necessitate unduly large outlays of capital assistance in the future, which over the long term will be more costly than the annual provision of a reasonable level of funds for major repairs, renovations and replacement.

Council continues to use a level of 1% of the value of the space inventory in the

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7 Letter from the Honourable B. Stephenson to Presidents of provincially-assisted universities, June 17, 1983.

8 *1983 Ontario Budget*, May 10, 1983, p. 10.

university system as the minimum necessary annually for major repairs, renovations and replacement projects. For 1984-85, the value of this space inventory has been adjusted for inflation by increasing last year's recommendation for capital assistance by 9.0%, the most recent increase in the Non-Residential Building Construction Price Index (1981 to 1982).

Accordingly, Council *recommends to the Minister and Lieutenant-Governor in Council:*

OCUA 83-14
LEVEL OF SUPPORT FOR MAJOR REPAIRS, RENOVATIONS AND REPLACEMENT PROJECTS IN 1984-85

THAT funds for capital assistance in 1984-85 be $27.6 million for major repairs, renovations and replacement projects, plus any amount required for carry-overs and essential new construction.

Conclusion

While funding was increased in 1983-84, the increase fell short of that recommended by Council as being required to meet the basic funding objectives. The shortfall between university system revenues and needs thus continues to accumulate. Adequate funding must be provided if Ontario is to have a university system capable of adequately meeting the five goals enunciated by Council in *The Ontario University System: A Statement of Issues* and endorsed by Government. These goals are: (1) to develop a more educated populace; (2) to educate and train people for the professions; (3) to provide study at the highest intellectual level; (4) to conduct basic and applied research including development and evaluation; and (5) to provide service to the community. It is Council's conviction that the funds recommended in this memorandum are the minimum required to ensure that quality does not decline further and that the goals of the Ontario university system will be met in 1984-85 to at least the same extent that they are being met in 1983-84.

B. C. Matthews
Chairman
June 17, 1983

Appendix A

Revised calculation of Shortfall in Funding for 1983-84

The estimate of the basic funding requirements for 1983-84 contained in Advisory Memorandum 82-XIV have been revised to reflect up-dated estimates of CPI and enrolment change. The factor for non-salary items has been changed from 11.0% to 7.6%. Enrolment increase projections have been changed from 3.0% to 3.2%. As a result, the revised estimate of the cost of basic funding objectives in 1983-84 is $1,427.4 million.

The estimate of total funds available to the Ontario university system has also been revised to reflect up-dated information on government grants and fees. Council now estimates that total fee income (formula tuition and other fees) will be $266.3 million in 1983-84. Government operating grants will total $1,108.0 million (not including the $0.685 million for the grant-in-aid to the Bar Admission Course). Other revenue is estimated to be $51.9 million in 1983-84. Thus, the total estimated revenue available to the system is $1,426.1 million.

The revised estimate of the shortfall in revenue compared to the expenditures required to meet the basic funding objectives, is $1.3 million ($1,427.4 – $1,426.1 million).

Appendix B

The 1983-84 Base

This appendix outlines the derivation of the 1983-84 base used in Council's funding exercise. For the purpose of this exercise, Council assumes that system expenditures in 1983-84 will equal total revenue, and estimates total operating revenue at $1,426.1 million. Table A–1 provides details of 1983-84 revenues by type.

Formula and Non-Formula Grants
The figure $1,108.0 million found in Table A–1 is derived by subtracting $4.855 million in line-item grants and $0.685 million to be used for the grant-in-aid to the Bar Admission Course from the $1,113.5 million in operating grants announced by the Minister on February 15, 1983 and rounding to the nearest decimal point.

Formula and Other Fees
Council's funding base includes only that fee revenue which is derived from formula fees and other fees. Any revenue accruing to the universities as a result of the application of their discretionary tuition fee power has been excluded from the base. The 1983-84 formula fee revenue is estimated to equal $253.68 million. This is calculated by applying the 1982-83 formula fee rates to 1982-83 enrolment and adjusting for the predicted 3.2% increase in enrolment for 1983-84. This figure also includes an estimate of supplementary foreign fee revenue and third-term graduate formula fees. The other fee revenue estimate of $12.6 million was based on the universities' budget reports for 1983-84.

Other Revenue
Other revenue includes Ministry line-item grants of $4.85 million and an estimated $47.0 million in other sources of income. The latter amount was derived from the universities' reports on budgeted revenue for 1983-84.

Table A–1

University System Revenue
1983–84 Estimate
($ millions)

Formula and Non-Formula Grants*	1,108.0
Formula Fees	253.7
Other Fees	12.6
Other Revenue**	51.9
Total	1,426.1

* Excludes Ministry line-item grants and Bar Admission Course grant-in-aid.
** Includes Ministry line-item grants.

83-IVA Government Support of the University System in 1984-85 in Light of the Public Sector Prices and Compensation Review Act, 1983

On June 17, 1983, Council finalized its advice on the level of Government support required by the university system in 1984-85, and on June 28, 1983, submitted that advice to the Minister of Colleges and Universities. Since then, the Treasurer of Ontario has introduced legislation to continue public sector wage and price restraint for one more year. Certain provisions in this legislation have altered the financial environment for 1984-85 for the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College from that projected by Council in June, 1983.

On November 8, 1983, the Treasurer introduced Bill 111, *An Act to Provide for the Review of Prices and Compensation in the Public Sector and for an orderly Transition to the Resumption of full Collective Bargaining*. Under this Bill, the Inflation Restraint Board is to be charged with assessing:

> ...changes in compensation in the public sector to determine their conformity with such criteria as the Treasurer determines...and may, where in its opinion the pattern of compensation increases in the public sector is inconsistent with the criteria, recommend to the Treasurer that further appropriate measures be taken.[1]

In his statement to the Legislature on November 8, 1983, the Treasurer stated:

> ...as the legislation requires, I will be advising the Board that the criterion against which it will assess compensation increases in the broadly-defined public sector should be 5 per cent.
>
> In making its assessment, the Board will consider increases in total compensation. That is, it will consider increases in wages, benefits and perquisites and the cost of providing merit increases and increments.

Unlike the *Inflation Restraint Act, 1982* the restraint provisions outlined above are guidelines and not statutory regulations. As such, there is no legal sanction or mechanism in place to compel public sector groups to negotiate settlements which conform to the criteria outlined by the Treasurer. However, the Treasurer has also stated that:

> ... grants and transfers to municipalities, school boards, universities and other publicly-funded institutions, as well as allocations for our own civil servants, will provide for average compensation increases of up to 5 per cent for a group.[2]

In light of this announcement of Government policy, Council has revised its advice for the funding of salaries and fringe benefits in the Ontario university system. This revision, therefore, is submitted in anticipation of the passage of Bill 111 and the recommendations contained herein are conditional upon the Bill's passage.

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1. Bill 111, *Public Sector Prices and Compensation Review Act, 1983*, Clause 4 (a), p. 6.
2. Statement by the Honourable L. Grossman, Treasurer of Ontario and Minister of Economics, to the Legislature (November 8, 1983)

In this Memorandum, Council takes account of the impact of the announced restraint program for 1984-85, re-calculates its advice on the amount of Government support required for 1984-85, and, in anticipation of the passage of Bill 111, makes new recommendations to replace Recommendation 83-9 and Recommendation 83-10 contained in Advisory Memorandum 83-IV.

I. Calculation of Funding Requirements for 1984-85

The Basic Funding Objectives for 1984-85 presented in Advisory Memorandum 83-IV remain unchanged. The cost of meeting the basic funding objectives for 1984-85, however, has been recalculated. The results of this are shown in Table I.

(a) *The 1983-84 Base (Column 1)*

The 1983-84 Base remains unchanged at $1,426.1 million.

(b) *Increases in Costs due to Inflation (Column 2)*

The twelve months following the end of the "5 percent year" under the *Inflation Restraint Act, 1982* is defined in the Bill as a "restraint period" where any changes to compensation in the public sector must be filed with the Inflation Restraint Board for its assessment and review in light of the Treasurer's 5% average compensation criteria noted above. For most Ontario universities, this new restraint period will be in effect for the last 10 months of the 1984-85 fiscal year, while for the remainder it will be in effect for 12 months of the 1984-85 fiscal year. On average, the new restraint period will be in effect for 10.5 months of the 1984-85 fiscal year.

Council has re-estimated its 1984-85 salary inflation factor to reflect salary costs under the Government restraint program. In the first 1.5 months of the 1984-85 fiscal year, universities are required under the *Inflation Restraint Act, 1982* to give salary scale increases of 5%.[3] For the remaining 10.5 months the 5% guideline on average salary compensation outlined by the Treasurer when he introduced the *Public Sector Prices and Compensation Review Act, 1983* will apply. Therefore, Council's new salary inflation factor for the entire 1984-85 fiscal year is 5%.

For several years, increases in the prices of non-salary items purchased by universities have exceeded increases in the Consumer Price Index. The annual increase in the Ontario University Non-Salary Price Index (OUNSPI) averages 25.3% higher than the annual increase in the CPI during the period 1975-76 to 1981-82. After reviewing the most recent forecasts by several competent authorities, Council believes that there is no reason to change its June, 1983 estimate of the increase in CPI in 1984-85 of 5.5%. Council's 1984-85 non-salary inflation factor is derived by increasing the projected 5.5% increase in the CPI by the average differential between the increase in the OUNSPI and the CPI for the period cited. This yields a value of 6.9%.

(c) *Increase in Costs of Maintaining Existing Service Levels (Column 3)*

As Council pointed out in Advisory Memorandum 83-IV, the progress-through-the-ranks (PTR) costs in the first 1.5 months of the 1984-85 fiscal year are affected by the *Inflation Restraint Act, 1982*. This Act does not allow any increase in salaries to recognize PTR for individuals with salaries equal to or greater than $35,000. If the faculty manpower flow model, developed by the Council of Ontario Universities, is adjusted to reflect this, on an annual basis, the estimated net costs of providing for faculty PTR in 1984-85 would be -0.7% of faculty salaries and benefits. In Advisory Memorandum 83-IV, Council noted that the *Inflation Restraint Act, 1982* does not limit PTR salary increases for the majority of non-academic staff. The savings experienced as a result of not having to provide PTR to the remaining non-academic staff earning over $35,000 in salary are expected to be more than offset by the

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3. See the *Inflation Restraint Act, 1982* for details on the special treatment of employees earning under $20,000 per year.

Table I

The Cost of Basic Funding Objectives for 1984-85
($ million)

	1	2	3	4	5	6	7
	1983-84 Base	Inflationary Trend Costs	Service Level Costs	Efficiency/ Rationalization Factor	Predicted Enrolment Change	Stabilization Factor	Cost of Basic Objectives for 1984-85
Expenditures							
Salaries and Fringe Benefits	1,150.9	57.5	0.6	0.0	33.9	-16.9	1,226.0
Non-Salary	275.2	19.0	0.0	0.0	8.2	- 4.1	298.3
	1,426.1	76.5	0.6	0.0	42.1	-21.0	1,524.3

Notes:

1. Percentage change factors are as follows:

	Salaries and Fringe Benefits	Non-Salary
Column 2:	+ 5.0%	+ 6.9%
Column 3:	+ 0.05%	+ 0.0%
Column 4:	+ 0.0%	+ 0.0%
Column 5:	+ 2.8%	+ 2.8%
Column 6:	- 50.0% of Column 5	- 50.0% of Column 5

2. These factors, except for column 6, are applied to the cumulative total of the previous columns

provision under this restraint legislation to provide individuals earning less than $20,000 a salary scale increase of greater than 5%. Consequently, Council uses 1.7% as the estimated annual cost of providing for career progress in the non-academic staff complement in the first 1.5 months of 1984-85. Applying the -0.7% PTR factor to that portion of total salary costs attributable to faculty (55%) and the 1.7% PTR factor to that portion attributable to non-academic staff (45%) results in an estimated net cost increase of 0.38% for career progress of faculty and staff for the first 1.5 months of the 1984-85 fiscal year.

The guidelines accompanying the *Public Sector Prices and Compensation Review Act, 1983* do not provide for additional funding of PTR costs during the new restraint period. The 5% compensation increase criterion outlined by the Treasurer includes the cost of providing merit increases and increments. Therefore, for the last 10.5 months of the 1984-85 fiscal year the estimated net cost of PTR (above that which is not included in the 5% salary scale provision found in Column 2 of Table I) is 0.0% of faculty and staff salaries and wages.

Applying the 0.38% PTR factor for 1.5 months and the 0.0% PTR factor for the remaining 10.5 months of the 1984-85 fiscal year results in an estimated net cost increase of 0.05% in 1984-85 for career progress of faculty and staff. This factor has been applied to the total of all salaries and fringe benefits expenditures.

(d) *Cost Reduction due to Efficiency/Rationalization (Column 4)*
For several years, Council has reduced its total funding estimate by a factor of 0.5% to 1.5% in the belief that institutions can reduce expenditures to some extent, while retaining levels of service by improved efficiency and rationalization of their program offerings. In Advisory Memorandum 83-IV, an efficiency/rationalization factor of -0.5% was used in calculating the funding requirements for 1984-85. In making this recommendation Council noted:

> It has been argued for a number of years by the Council of Ontario Universities and others that any of the cost reductions that can be achieved by increasing efficiency/rationalization must be used to offset the backlog of major problems arising from prolonged underfunding. It is further argued that the effects of the efficiency/rationalization factor are compounded annually at a greater rate than intended by Council by ignoring the effects of previous years' shortfalls in funding on the base (used in Council's funding model).

Council remains committed to the belief that the university system must continue to search for ways to increase efficiency. However, Council believes that this goal will be accomplished for 1984-85 by the *Public Sector Prices and Compensation Act, 1983*. Consequently, it feels that it is appropriate to include a 0.0% factor for the second year of the Government-initiated restraint program - 1984-85. It should be noted that Council is not removing this factor from its funding model. It is merely taking into account the intentions and effects of the new restraint legislation on the university system's costs in 1984-85. Therefore, a factor of 0.0% is included in Column 4 of Table I.

(e) *Projected Increase in Enrolment (Column 5)*
In Advisory Memorandum 83-IV, Council estimated that enrolment in the Ontario university system will increase by 1.8% in 1984-85 over 1983-84. However, this estimate assumed that the 1983-84 intake of new students would remain unchanged from the level found in 1982-83. Preliminary enrolment figures for 1983-84 indicate that first-year intake is up betweeen 2% and 3% and that retention rates for continuing students are also up from the levels found in 1982-83. On the basis of this information, Council now estimates that the flow-through of continuing students in 1984-85 will be higher than first estimated. Council, therefore, has re-estimated its enrolment change factor for 1984-85. It now estimates that the total enrolment in the university system in Ontario will increase by 2.8%.

(f) *Funding Stabilization Factor (Column 6)*
As in Advisory Memorandum 83-IV: 50% of (e).

(g) *Total Cost of Basic Funding Objectives (Column 7)*
By adding the figures in Columns 1 to 6 inclusive, Council's revised estimate of the total cost of basic funding objectives in 1984-85 is $1,524.3 million, a 6.9% increase over the 1983-84 estimated expenditure base.

II. Estimated Government Grants Required to Meet the Basic Funding Objectives
Council's estimate of other income accruing to the university system in 1984-85, in addition to Government grants and tuition fees is:

(1) from other sources, $51.9 million, the same as the amount projected for 1983-84; and
(2) from fees other than tuition fees, $13.0 million, the 1983-84 projection adjusted for the projected 2.8% increase in enrolment in 1984-85.

Formula tuition fees at 1983-84 rates and adjusted for the predicted 2.8% increase in enrolment in 1984-85 are estimated to equal $260.8 million. Consistent with Council's advice on formula fee rates in Advisory Memorandum 79-IV, it is assumed that formula fee rates will increase by the same percentage as operating grants. Therefore, formula fee rates should be increased by 6.6% in 1984-85, yielding an additional $17.3 million for a total of $278.1 million in formula fee revenue in 1984-85.[4]

As shown in Table II, Council estimates that of the total $1,524.3 million required, $1,181.4 million must be made available as Government operating grants to meet the costs of Council's basic funding objectives in 1984-85. This is a 6.6% increase over the amount provided for 1983-84.

Accordingly, and conditional upon the passage of Bill 111, Council *recommends to the Minister and Lieutenant-Governor in Council:*

OCUA 83-9A
GOVERNMENT OPERATING GRANTS FOR 1984-85 TO MEET THE COST OF COUNCIL'S BASIC OBJECTIVES IN FUNDING PROVINCIALLY-ASSISTED UNIVERSITIES AND THEIR AFFILIATED COLLEGES, RYERSON POLYTECHNICAL INSTITUTE, THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION, THE ONTARIO COLLEGE OF ART AND DOMINICAN COLLEGE

THAT $1,181.4 million in operating grants be made available in 1984-85 to the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College.

OCUA 83-10A
FORMULA FEE RATES FOR 1984-85 TO MEET THE COSTS OF COUNCIL'S BASIC OBJECTIVES

THAT formula fee rates for 1984-85 be increased by the same percentage as operating grants, namely 6.6%, to provide $278.1 million in formula fee revenue to the provincially-assisted universities and their affiliated colleges, Ryerson Polytechnical Institute, the Ontario Institute for Studies in Education, the Ontario College of Art and Dominican College, and that this increase in formula fee rates be fully reflected in the Ontario Student Assistance Program.

4. If, however, the tuition fee rate increase in 1984–85 is held to 5%, as it was under the *Inflation Restraint Act, 1982*, there would only be $273.8 million available from tuition fee income. Consequently, Government operating grants would have to be increased by $4.3 million or 0.4%.

Table II

Cost to Government of Meeting Council's Basic Funding Objectives for 1984–85: Provincially-Assisted Universities, Affiliated Colleges, Ryerson, OISE, OCA and Dominican College
($ million)

1.	Cost of Basic Funding Objectives	1,524.3	
2.	Other Revenue	(51.9)	
3.	Other Fee Revenue	(13.0)	
4.	Total Formula Fees and Government Operating Grants required to meet Council's Basic Funding Objectives	1,459.4	
5.	Formula Fee Revenue at 1983-84 rates and the predicted 1984-85 level of enrolment	260.8	
6.	1983-84 Operating Grants	1,108.0	
7.	1983-84 Operating Grants and enrolment–adjusted Formula Fee Revenue (line 5 + line 6)	1,368.8	
8.	Percentage increase in Operating Grants and Formula Fee Revenue $\frac{\text{(line 4 – line 7)}}{\text{line 7}} \times 100$		6.6%
9.	Additional Formula Fee Revenue generated by a 6.6% increase in formula fee rates	17.3	
10.	Total Formula Fee Revenue (line 5 + line 9)	278.1	
11.	Cost to Government of Basic Funding Objectives (line 6 increased by 6.6%)	1,181.4	

Upon passage of Bill 111, these recommendations will supercede Recommendation 83-9 and Recommendation 83-10 in Advisory Memorandum 83-IV. Council re-affirms Recommendations 83-11, 83-12, 83-13 and 83-14 contained in Advisory Memorandum 83-IV.

Conclusion

In light of Government's restraint program, it is Council's conviction that the funding recommended above is the minimum required if the goals of the Ontario university system are to be met in 1984-85 to the same extent that they are being met in 1983-84 and if quality is not to decline further. It should be noted that, assuming the present formula remains unchanged, the increase in basic funding recommended would result in an increase in Basic Income Unit values of 4.6%. Also, preliminary enrolment estimates for 1983-84 indicate to Council that under the present formula the range in grant increases to Ontario universities, assuming the above recommendations are accepted, is likely to be from 3.2% to 11.3%. Any grant increase less than that recommended by Council will leave some institutions in an extremely difficult position during the restraint period.

M. Paikin
Acting Chairman
December 9, 1983

83-V Funding for a New Public Administration Degree Program at Ryerson Polytechnical Institute

On March 8, 1983, in accordance with the procedures outlined in Advisory Memoranda 78-IV and 80-III, Ryerson Polytechnical Institute submitted, to Council, a new degree program in Public Administration for funding approval. Council has reviewed the material submitted by Ryerson and has concluded that the conditions for funding approval have been met. The program has been approved by Ryerson's Academic Council with respect to academic quality; the program's financial viability has been attested to by the Institute's Board of Governors; and the societal need for the program has been certified by a Program Assessment Committee. These assurances are supported by the material required by Council.

Accordingly, Council *recommends to the Minister:*

OCUA 83-15
FUNDING FOR A NEW PUBLIC ADMINISTRATION DEGREE PROGRAM AT RYERSON POLYTECHNICAL INSTITUTE

THAT the Bachelor of Applied Arts (Public Administration) program be deemed eligible for formula support beginning in 1984-85, and that eligible enrolment, from 1983-84 on, be included in the moving average for Ryerson Polytechnical Institute.

B. C. Matthews
Chairman
June 17, 1983

83-VI Post-Residency Fees

On January 7, 1983, the Minister of Colleges and Universities wrote to the Chairman of Council concerning her discussions with the Ontario Graduate Association (OGA) on the subject of "post-program fees", which she defined as fees "charged to graduate students who have completed their course work but not their theses". The Minister noted that the OGA had indicated that "post-program fees have recently been dramatically increased by some institutions and now vary widely across the system". She concluded by asking that Council "review the situation and advise... whether, in their view, any action on the part of the Ministry is necessary".

In response to the Minister's letter, Council invited the OGA and the Council of Ontario Universities (COU) to submit information, comments and advice concerning "post-residency fees".[1] Subsequently, Council discussed the OGA's written submission in a special hearing with that organization. Also, Council raised the matter of post-residency fees with a number of universities during its annual Spring hearings. In this memorandum, therefore, Council reviews the area of post-residency fees in general and the question of the possible need for action on the part of the Ministry in particular.

Post-Residency Fees: Background and Institutional and Governmental Policies

In graduate programs offered by Ontario universities, it is common practice to require all full-time students to complete stipulated minimum periods of residency study. The establishment of the length of the period and of the curriculum demands to be met during this time have traditionally been the prerogative of the individual institutions. There is, therefore, considerable variation among the universities' requirements for residency periods for degrees, and an exact and universal definition of residency and post-residency (and their associated fees) is problematic.

Examples of the great variation among universities and programs are, at the doctoral level, a nine-semester residency requirement for a Doctor of Veterinary Science degree at Guelph as opposed to a four-term minimum stipulation for a Ph.D. at Queen's. At the master's level, Trent has a one year residency requirement while York has a two-term requirement. Generally, however, the residency requirement entails a minimum of one year (2-3 terms) residency study at the master's level and two years (4-6 terms) residency study at the doctoral level. Consecutive registration throughout the period is usually mandatory. For most master's programs and all doctoral programs, students in the humanities and social sciences generally complete course requirements and, if applicable, study for comprehensive examinations during the specified residency period, with the thesis, paper or project being completed during the post-residency period. In the natural sciences and engineering, graduate students usually place heavy demands on institutional resources throughout their programs of study. In constructing fee schedules, all institutions differentiate between full-time and part-time status and most have established differential fees applicable only to post-residency students. This separate fee category allows most full-time master's and doctoral students who have satisfied residency requirements the benefit of a lower fee when registering after residency demands have been fulfilled.

Under the terms of the *Operating Formula Manual*, no distinction is made by the government between resident and post-residency students and the fees they are charged. The *Manual* states:

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1. Council has chosen to describe the fees in question as "post-residency" rather than "post-program" fees, since an incorrect connotation of the latter description could be that the student's formal program was complete before these fees were assessed when, in fact, only the residency component of the program will have been satisfied.

> For all graduate students exempt from the foreign student fee, including full-time equivalents of part-time students, a formula fee ($504 in 1983-84) will be deducted for each term of attendance.[2]

Thus, the formula fee for post-resident students is equal to the formula fee for resident students. The only limitation is that, as with undergraduate fees, actual graduate fees charged may not exceed 110% of the formula fee without being countered by a reduction in the operating grant.

Views Concerning Post-Residency Fees

Council's discussion of post-residency fees with the OGA yielded essentially the same arguments which this group had presented to the Minister: namely, that there had been considerable increases in these fees in the recent past, and that there was great variation among post-residency fees charged by the universities. Further, the OGA stated that "post-residency fees are being greatly increased to compensate for government underfunding", and suggested that the situation was worsening and could eventually result in the abolition of these fees.[3] The OGA recommended the development of guidelines to regulate post-residency fees in such a way that they not exceed 20% of regular graduate tuition fees. This proposal was justified on the grounds that post-residency students contribute far more to the universities' teaching and research resources and intellectual milieu than they draw from these resources.[4]

During Council's annual Spring hearings, the issue of post-residency fees was raised periodically by Council members. In response, academic administrators indicated that this was not currently a major campus issue, for while these fees had increased they remained considerably below formula fees and in most cases were well below regular graduate fees as well. COU chose not to submit advice or to address post-residency fees during their hearing, but did provide information on post-residency fee levels for 1980-81 to 1982-83 which has been used in the data accompanying this memorandum.

Post-Residency Fee Data

Table 1 provides information on graduate fees for regular and post-residency students from 1980-81 to 1983-84. In advance of suggesting interpretations for these data, Council wishes to note both the shortness of the historical period covered and the presence of a 5% limit on tuition fee increases for 1983-84 (resulting from the government's restraint program), which make it difficult to project trends. There is indeed considerable divergence among the fees charged to post-residency students by the institutions, some of which (McMaster and Windsor) offer no post-residency reduction at all. Also, post-residency fees did increase dramatically in some years at some institutions (such as Laurentian by 41.2% and Trent by 380% in 1981-82, and at Ottawa by 105.1%, Toronto by 53.2% and York by 72.1% in 1982-83). However, the dramatic increases cited occurred at institutions which had low post-residency fees at the outset, and only served to bring their fee levels in this area more in line with the system average. Further, the five institutions noted for large percentage increases in post-residency fee rates did not, in dollar terms, move into the range of the three institutions having traditionally the highest post-residency fees – McMaster, Windsor and Guelph. Also, there are instances where post-residency fee rates have declined (as at Guelph in 1982-83 and Carleton in 1983-84)[5] and

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2. Ministry of Colleges and Universities, *Operating Formula Manual*, p. 40.
3. Ontario Graduate Association, *Submission to the Ontario Council on University Affairs*, May 18, 1983, p. 3.
4. *Ibid.*, pp. 1–4.
5. OGA, *Submission*, p. 2.
   One of the OGA's secondary arguments asserted that "rationalization", as evinced by the Trent/Queen's agreement and the resultant post-residency fee increase at Trent in 1981–82, could act as a cause of dramatic post-residency fee increases. Subsequently, however, Carleton's reduction of its 1983–84 post-residency fee to bring it in line with Ottawa's lower post-residency fee proves the reverse can also occur without external intervention.

increases at most institutions in most years have remained roughly equivalent to those of regular graduate student fees (see Table 2). A coefficient of variation test (see Table 1) indicates a continued narrowing of the variance between the average fee rate and the post-residency fees charged annually by individual universities.

Despite the incidence of divergent post-residency fee levels, one can draw the following basic conclusions, *inter alia*, from Table 1:

(i) post-residency fees have remained considerably below the existing formula fee maximum;

(ii) post-residency fees have remained, on average, at approximately half the level of regular graduate fees; and

(iii) post-residency fees are showing an annual decline in their variation from the mean.

Assessment of Post-Residency Fees

As mentioned previously, the *Operating Formula Manual* does not make any distinction between residency and post-residency students. But in order for government to attempt to control the level of post-residency fees, it would have to establish a "formula post-residency fee" and, concomitantly, a fixed "residency period" to apply uniformly across the university system. This would not only intrude on institutional autonomy vis à vis academic term requirements for post-residency students, but also could, in creating a "ceiling" fee, establish a "floor" level, thus prompting post-residency fee increases at a faster rate and to higher levels than now exist.

Variation in post-residency fees among universities is typical throughout the period in question and it is clear that some institutions have sometimes raised fees in the post-residency area beyond the rate of other fee increments. It is noteworthy, however, that all institutions, in utilizing their autonomy to raise fees, have exercised self-restraint by foregoing permissible increments, and have maintained, on average, roughly the same ratio between post-residency and full-time fees over the period from 1980-81 and 1983-84. The low level of most post-residency fees in comparison with full-time fees suggests a general recognition by the universities of the services and intellectual stimulation provided by post-residency students as well as a tacit acknowledgment of their limited financial resources. Also, differing fee levels now reflect, in part, the institutions' individual assessments of resources used by their post-residency students.

On balance, Council believes that there is no need for action on the Ministry's part to control post-residency fees. Sharp fee increases have occurred primarily at institutions whose fees were very low, and the overall trend appears to be moving toward a ratio in which post-residency fees are approximately 50% of regular fees. In addition, action by the Ministry could serve to precipitate a move by all institutions to raise their post-residency fees nearer the level of regular (and formula) graduate fees.

Accordingly, Council *recommends to the Minister:*

OCUA 83-16
POST-RESIDENCY FEES

THAT no action by the Minister be taken regarding the existing tuition fee practices and policies as they affect post-residency students.

M. Paikin
Acting Chairman
November 18, 1983

Table 1

Full-Time Graduate Student Tuition Fees, Annual Regular and Post-Residency[1] Rates
Canadians and Landed Immigrants
1980-81 to 1983-84
($)

	1980-81		1981-82		1982-83		1983-84	
	Regular	Post-Residency	Regular	Post-Residency	Regular	Post-Residency	Regular	Post-Residency
Formula Fees[2]	1,164.00	1,164.00	1,281.00	1,281.00	1,440.00	1,440.00	1,512.00	1,512.00
Brock (175)	880.00	180.00	1,000.00	210.00	1,125.00	240.00	1,181.25	252.00
Carleton (1,177)	921.00	585.00	1,107.00	675.00	1,284.00	756.00	1,362.00	498.00
Guelph (1,026)	886.50	886.50	1,008.00	1,008.00	1,161.00	870.00	1,218.00	870.00
Lakehead (158)	850.00	335.00	990.00	390.00	1,155.00	390.00	1,220.00	470.00
Laurentian (97)	870.00	225.00	990.00	360.00	1,140.00	450.00	1,197.00	474.00
McMaster (1,524)	869.00	869.00	1,028.00	1,028.00	1,162.00	1,162.00	1,220.00	1,220.00
Ottawa (1,780)	833.00	204.00	962.00	234.00	1,202.00	480.00	1,254.00	504.00
Queen's (1,865)	870.00	435.00	960.00	480.00	1,080.00	540.00	1,134.00	567.00
Toronto (5,101)	854.00	256.00	939.00	282.00	1,080.00	432.00	1,134.00	454.00
Trent (44)	868.50	100.00	960.00	480.00	1,080.00	540.00	1,134.00	567.00
Waterloo (1,586)	864.00	345.00	978.00	390.00	1,140.00	456.00	1,212.00	486.00
Western (2,195)	868.50	357.00	977.00	402.00	1,131.00	474.00	1,187.00	498.00
WLU (358)	847.00	168.00	935.00	180.00	1,075.00	207.00	1,130.00	216.00
Windsor (789)	800.00	800.00	910.00	910.00	1,056.00	1,056.00	1,108.00	1,108.00
York[3] (1,669)	915.00	300.00	1,035.00	340.00	1,371.00	585.00	1,440.00	615.00
Mean	866.43	405.03	985.27	491.27	1,149.47	575.87	1,210.71	586.60
% Increase in Mean			13.7%	21.3%	16.7%	17.2%	5.3%	1.9%
Coefficient of Variation	3.3%	61.9%	4.7%	55.6%	7.1%	45.9%	7.4%	45.8%
% Increase in CPI[4]	11.2%	11.2%	12.1%	12.1%	10.1%	10.1%	7.5%	7.5%

(1) Post-residency fees, where available, apply to most graduate programs (although some institutions have different fees for some programs) and are charged after the residency period (usually one academic year at the master's level and two academic years at the doctoral level).

(2) Formula fees indicated are annual, although they are actually charged on a per term basis at the following rates: 1980-81, $388/term; 1981-82, $427/term; 1982-83, $480/term; 1983-84, $504/term.

(3) Figures include "compulsory university charges" (corresponding to ancillary fees at other institutions) of approximately $120 which are not separately identified.

(4) CPI percentages are fiscal year actuals for 1980-81 to 1982-83, and are projected for 1983-84.

Note: ( ) = 1982-83 Full-time two term equivalent (including post-residency) graduate student enrolment.

Source: *U.A.R. Financial Reports*, 1983.

Table 2

Percent Change in Regular and Post-Residency Fee Rates
Canadians and Landed Immigrants
1981-82 to 1983-84
(%)

	1981-82		1982-83		1983-84		1980-81 to 1983-84	
	Regular	Post-Residency	Regular	Post-Residency	Regular	Post-Residency	Regular	Post-Residency
Formula Fees	10.1	10.1	12.4	12.4	5.0	5.0	29.9	29.9
Brock	13.6	16.7	12.5	14.3	5.0	5.0	34.2	40.0
Carleton	20.2	15.4	16.0	12.0	6.1	-34.1	47.9	-14.9
Guelph	13.7	13.7	15.2	-13.7	4.9	0.0	37.4	-1.9
Lakehead	16.5	16.4	16.7	0.0	5.6	20.5	43.5	40.3
Laurentian	13.8	41.2	15.2	25.0	5.0	5.3	37.6	85.9
McMaster	18.3	18.3	13.0	13.0	5.0	5.0	40.4	40.4
Ottawa	15.5	14.7	24.9	105.1	4.3	5.0	50.5	147.1
Queen's	10.3	10.3	12.5	12.5	5.0	5.0	30.3	30.3
Toronto	10.0	10.2	15.0	53.2	5.0	5.1	32.8	77.3
Trent	10.5	380.0	12.5	12.5	5.0	5.0	30.6	467.0
Waterloo	13.2	13.0	16.6	16.9	6.3	6.6	40.3	40.9
Western	12.5	12.6	15.8	17.9	5.0	5.1	36.7	39.5
WLU	10.4	7.1	15.0	15.0	5.1	4.3	33.4	28.6
Windsor	13.8	13.8	16.0	16.0	4.9	4.9	38.5	38.5
York	13.1	13.3	32.5	72.1	5.0	5.1	57.4	105.0
Mean	13.7	21.3	16.7	17.2	5.3	1.9	39.7	44.8

Table 3

Post-Residency Fee Rates as a Percentage of Regular Fees
Canadians and Landed Immigrants
1980-81 to 1983-84
(%)

	1980-81	1981-82	1982-83	1983-84
Brock	20.5	21.0	21.3	21.3
Carleton	63.5	61.0	58.9	36.6
Guelph	100.0	100.0	74.9	71.4
Lakehead	39.4	39.4	33.8	38.5
Laurentian	29.3	36.4	39.5	39.6
McMaster	100.0	100.0	100.0	100.0
Ottawa	24.5	24.3	39.9	40.2
Queen's	50.0	50.0	50.0	50.0
Toronto	30.0	30.0	40.0	40.0
Trent	11.5	50.0	50.0	50.0
Waterloo	39.9	39.9	40.0	40.1
Western	41.1	41.1	41.9	42.0
WLU	19.8	19.3	19.3	19.1
Windsor	100.0	100.0	100.0	100.0
York	32.8	32.9	42.7	42.7
Mean	46.7	49.9	50.1	48.5

83-VII Differential Fees for Visa Graduate Students

In her letter of February 15, 1983, to the Chairman of Council, the Minister of Colleges and Universities accepted the recommendations made in Advisory Memorandum 82-IX, "Differential Fees for Visa Graduate Students", namely:

i) that, the proposed further increase in fees for visa graduate students in 1983-84 be delayed for at least one year so that the impact of the higher fees for 1982-83 may be evaluated; and
ii) that, visa students registering for a Doctoral degree immediately after having been registered in a Master's degree in the same discipline in the same university prior to September 1, 1982, not be assessed the fee increase announced for 1982-83 for newly-admitted students.[1]

In light of the Minister's acceptance of the former recommendation, Council undertook to evaluate the impact on enrolment of the 1982-83 first-stage increase in visa graduate student fees for that year and for the current year, 1983-84. This memorandum, therefore, reviews the evidence concerning the effect of the 1982-83 increase, and recommends a future course of action with respect to the proposed second-stage fee increase and the provision of financial assistance for visa graduate students.

Visa Graduate Student Enrolment and Fee Data

Table 1 provides visa graduate student enrolment figures (full-time and part-time Fall head count) from 1981 to 1983 inclusive, and demonstrates that a major decrease has occurred over the period.[2] Between 1981 and 1983 total visa graduate enrolment is down by 577 students (-16.6%). New intake, comprising almost exclusively full-time students who are directly affected by the 1982-83 fee increase, has declined by 561 registrants (-40.8%).

Table II indicates tuition fees charged to new visa graduate students by the institutions in 1982-83 and 1983-84. While the Council of Ontario Universities (COU) estimates that only about 20% of those enrolled for 1983-84 are paying maximum fees, the group paying these higher fees will form an ever-increasing proportion of the visa graduate student population in the future. New visa graduate students, who are not exempt because of special status under Section 7.1 of the *Operating Formula Manual* or who are not "grandfathered" because of registering before September 1, 1982, will have no alternative but to pay full fees or to enrol elsewhere. In view of the enrolment decline which has occurred since 1981, even if tuition fees remain the same and no additional financial assistance is provided, the number of visa graduate students registering in future seems likely to decline further.

In its 1983 brief to Council on visa graduate students, COU indicates that it is "gravely concerned" because the Government's 1982-83 tuition fee increase affecting visa graduate students has produced a "substantial decline" in enrolment between 1981 and 1983. Therefore, COU has recommended, in the short term, an indefinite postponement of the planned second-stage fee increase for visa graduate students. In the longer term, COU recommended additional scholarship assistance

1 Ontario Council on University Affairs, *Ninth Annual Report*, 1982-83, p. 123.

2 Comparison over this three year period is more meaningful than from year to year, as the data on 1982 Fall enrolment were skewed by the registration in the Spring and Summer before September 1, 1982, of many visa students who sought to avoid the 1982-83 differential fee increase. Therefore, in 1982, a marked decline in enrolment as a result of the fee increase did not occur as might have been expected.

from Government by increasing the number of Ontario Graduate Scholarships presently allocated for foreign graduate students as a means to alleviate the financial burden resulting from the 1982-83 fee increase.[3]

Views on Visa Graduate Students and Differential Fees

Council's detailed views on the importance of visa graduate students to the Ontario university system were outlined last year in Advisory Memorandum 82-IX, "Differential Fees for Visa Graduate Students". Similar opinions were stated this year by the institutions and COU during Council's hearings with them. Also of interest is some new information on problems, policies and practices with regard to foreign graduate students in the United States and Britain.

Noting that foreign graduate students are "treated differently" from foreign undergraduates in the United States, COU explained that:

> ...few foreign graduate students...actually pay...high fees...Private universities typically provide tuition bursaries and many state universities provide fee waivers. In some states foreign graduate students who are awarded teaching and/or research assistantships are classified as state employees, which makes them eligible to pay the lower "in-state" tuition fees. While the mechanisms and practices vary from university to university and from state to state, the net effect is the same. Foreign graduate students registered in universities in the United States are seldom required to pay the high tuition fees listed in the university calendars.[4]

Recent British experience shows that their 1980 policy of implementing full-cost tuition fees for non-British students and of withdrawing institutional grants in aid of foreign students (except those from the European Economic Community) resulted in a decline of 25.7% in total overseas student enrolment between 1980 and 1982.[5] In response to this decline, the British Government brought forward a major revision to this policy this year which is, as summarized by COU, that:

> The principle of full-cost tuition fees was to be retained, but its effects would be mitigated by the establishment of an enlarged scholarship fund for foreign students over the next three years. The fund will be increased from £65 to £111 millions and this is expected to provide an additional 5000-6000 scholarships annually to be distributed among foreign students registered in higher and further education in Great Britain.[6]

COU goes on to comment:

> The welcome change will enable British universities to meet their commitments to educate students from abroad as well as to attract first class international students, including Canadians. Enrolment of foreign students in British universities appears to be increasing this term.[7]

Council is aware that mechanisms used in other jurisdictions for dealing with visa graduate students are not always directly relevant to Ontario. In the United States, many universities are private and heavily endowed, whereas Ontario's university system is publicly funded. In the case of the United Kingdom, the unitary

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3. Council of Ontario Universities, "Formula Fees for Visa Graduate Students", October, 1983, pp. 1-5.
4. *Ibid.*, p. 3.
5. Overseas Students Trust, *A Policy for Overseas Students*, May, 1982, p. 32. This decrease includes both graduate and undergraduate students.
6. Council of Ontario Universities, "Formula Fees for Visa Graduate Students", October, 1983, p. 4.
7. *Ibid.*, p. 6.

system of government permits policy changes of an international nature which affect universities, such as those involving foreign students, to be carried out more readily than in Canada's federal system. Having assessed these examples and re-evaluated arguments put forward in Advisory Memorandum 82-IX, Council reaffirms its belief that providing university opportunities to visa graduate students is in the provincial and national interest.

Adjustment of Current Policy

1. Level of Fees

The purpose in establishing differential fees was reiterated by the Minister in her letter announcing the 1982-83 differential fee increase. She described it as a means of continuing to ensure that visa students would pay "a higher proportion...of the costs of their education."[8] Council acknowledges and supports the need to control public expenditures. Nonetheless, as stated in Advisory Memorandum 82-IX, Council is concerned that a continuing trend of declining visa graduate enrolment will seriously damage Ontario's graduate and research enterprise.[9]

This concern, therefore, has led Council to address the level of differential fees for visa graduate students. Council has examined three options: i) fees could be raised in a second-stage increase, as originally planned before Council's advice on postponement for this year was approved by the Minister; ii) fees could be reduced to a lower level; or iii) fees could be indexed to the rate of change in domestic fees.

Any additional increase in differential fees will in all likelihood curb enrolment dramatically by eroding even further Ontario's competitive position vis-à-vis other jurisdictions. Therefore, the most outstanding visa graduate students would likely go elsewhere. On the other hand, Council recognizes Government's position that foreign graduate students should make a greater contribution towards the cost of their education than domestic graduate students. Thus, a "roll-back" in differential fees for visa graduate students would be unacceptable, not only because it would reduce institutional income, but also because it would fail to acknowledge the Government's concerns about educational cost recovery from foreign graduate students. Therefore, on balance, Council believes that fees for visa graduate students should be increased only at the rate at which domestic fees are adjusted.

Accordingly, Council *recommends to the Minister:*

OCUA 83-17
DIFFERENTIAL FEES FOR VISA GRADUATE STUDENTS

THAT, the proposed second-stage increase in differential fees for visa graduate students not be implemented.

2. Availability of Assistance

Council appreciates the longstanding desire of the Ontario university community to foster a diversified mix of visa graduate students from many countries, regions and socio-economic backgrounds. Encouraging such diversity helps to fulfill international responsibilities and enhances the graduate experience for foreigners and Canadians alike.[10]

While having recommended the maintenance of existing differential fee levels, Council believes selective assistance should be available to worthy, but also needy, visa graduate students to offset high costs which could prevent them from being attracted to Ontario universities. Council does not share the view of COU that this additional assistance should be provided by Government through funds allocated in

8. Letter from the Honourable B. Stephenson to Dr. W.C. Winegard, February 18, 1982, p. 2.
9. Ontario Council on University Affairs, *Ninth Annual Report*, 1982-83, p. 121.
10. *Ibid.*, pp. 120-121.

the form of more Ontario Graduate Scholarships designated solely for foreign graduate students. Instead, it seems appropriate that support should come from and be controlled by the institutions. Also, since the institutions have the most direct insight into the needs of their students, it should be a university prerogative to determine who should be supported and the level of that support.

Council believes that the graduate "foreign fee supplement (the excess of foreign over normal program formula fees)"[11] collected by the universities as part of visa graduate student tuition fees should be available for institutions to use, if they wish, to support foreign graduate students who require financial assistance. Use of these funds would obviate the need for additional assistance from Government, and could be accomplished by changing the *Operating Formula Manual* to permit the graduate foreign fee supplement, currently limited to use for eligible operating expenses, to be used at the universities' discretion not only for that purpose but also for financial assistance for visa graduate students. The amount of these supplementary funds to be allocated for assistance would be determined independently by each university according to its assessment of the needs of its foreign graduate students. In 1982-83, for example, the maximum potential support available through this policy adjustment would have been approximately $5.9 million.

Accordingly, Council *recommends to the Minister:*

OCUA 83-18
ASSISTANCE FOR VISA GRADUATE STUDENTS

THAT, the current restriction in the *Operating Formula Manual* limiting the usage of the graduate foreign fee supplement to eligible operating expenditures be altered to allow universities to use this income for financial assistance for visa graduate students as well as for eligible operating expenditures.

M. Paikin
Acting Chairman
December 9, 1983

11. Ministry of Colleges and Universities, *Operating Formula Manual*, p. 16

Table I

Visa Graduate Student Enrolment, Fall Head Count 1981-83

	Visa Graduate Intake	Visa Graduate Enrolment	Total Graduate Enrolment[1]	% Visa
1981	1,374	3,466	16,117	21.5
1982	1,082 (–21.2%)	3,427 (–1.1%)	16,763 (+4.0%)	20.4
1983	813 (–24.9%)	2,889 (–15.7%)	17,434 (+4.0%)	16.6
% Change 1981-1983	(–40.8%)	(–16.6%)	(+8.2%)	

(1) Total graduate enrolment for 1981 and 1982 is taken from USIS final data for those years. The 1983 figure is estimated on the basis of the 1982 USIS final count increased by the 4% total graduate enrolment increase currently projected by COU.

Note: Bracketed percentages represent change from previous year(s).

Sources: Council of Ontario Universities and USIS 100104103.

Table II

Visa Graduate Student Tuition Fees,[1] Full-Time Rates per Term 1982-83 to 1983-84 ($)

	1982-83 (Formula Fee = $2,200/term)		1983-84 (Formula Fee = $2,310/term)	
Institution	Actual Fee	% of Formula Fee	Actual Fee	% of Formula Fee
Brock	1,667	(75.8)	1,750	(75.8)
Carleton	2,420	(110.0)	2,599	(112.5)
Guelph	2,100	(95.5)	2,205	(95.5)
Lakehead	2,200	(100.0)	2,310	(100.0)
Laurentian	2,100	(95.5)	2,310	(100.0)
McMaster	2,200	(100.0)	2,310	(100.0)
Ottawa	2,420	(110.0)	2,540	(110.0)
Queen's	1,667	(75.8)	1,925	(83.3)
Toronto	1,667	(75.8)	1,925	(83.3)
Trent	1,667	(75.8)	1,750	(75.8)
Waterloo	2,100	(95.5)	2,210	(95.7)
Western	2,200	(100.0)	2,310	(100.0)
WLU	2,078	(94.5)	2,183	(94.5)
Windsor	2,100	(95.5)	2,310	(100.0)
York	2,420	(110.0)	2,610	(100.0)
Average	2,067	(94.0)	2,216	(96.0)

(1) For non-exempt (Type B) foreign students. See Table III for explanation of visa graduate student categories.

Source: Ministry of Colleges and Universities

Table III

Graduate Student Formula Tuition Fees, Full-Time Rates per Term 1976-77 to 1983-84 ($)

	Domestic	Visa	Differential[1]
1983-84			
IN PROGRAM[2]	504.00	1,045	(+108.6%)
Type A	504.00	1,890	(+275.0%)
Type B	504.00	2,310	(+358.3%)
1982-83			
IN PROGRAM[2]	480.00	995	(+ 108.6%)
Type A	480.00	1,350	(+ 183.0%)
Type B	480.00	2,200	(+ 361.2%)
1981-82	427.00	887	(+ 108.3%)
1980-81	388.00	806	(+ 108.3%)
1979-80	360.00	750	(+ 108.3%)
1978-79	342.50	750	(+ 119.0%)
1977-78	342.50	750	(+ 119.0%)
1976-77	292.50	292.50	(0.0%)

(1) The differential is the amount by which the visa fee exceeds the domestic fee expressed as a percentage of the domestic fee.

(2) For 1982-83 and 1983-84 all "non-exempt" foreign students (those not excluded from paying differential fees under Section 7.1 of the *Operating Formula Manual*) are placed in one of three categories:

In Program: all non-exempt foreign students who registered in their program of study prior to September 1, 1982;

Type A: all non-exempt foreign students who registered after September 1, 1982 in a program with a formula weight of 1.5 or lower; and

Type B: all non-exempt foreign students who registered after September 1, 1982 in a program with a formula weight higher than 1.5.

Source: Ministry of Colleges and Universities, *Operating Formula Manual* (various years).

Table IV

Visa Graduate Student Enrolment as a Percentage of Total Graduate Enrolment, Full-Time and Part-Time Head Count 1977 to 1982

	Full-Time Graduate			Part-Time Graduate		
	Visa	Total	% Visa	Visa	Total	% Visa
1982	3,362	16,763	(20.1)	393	11,860	(3.3)
1981	3,307	16,117	(20.5)	396	11,859	(3.3)
1980	2,849	15,262	(18.7)	392	12,078	(3.3)
1979	2,644	14,947	(17.7)	407	12,055	(3.4)
1978	2,754	15,414	(17.9)	404	12,122	(3.3)
1977	2,794	15,655	(17.9)	373	12,325	(3.0)

Note: Totals exclude Unknown and Not Reported

Source: USIS 100104103-4

83-VIII Graduate Program Planning and Funding

In Advisory Memorandum 77-VII, Council outlined its objectives for the first graduate planning quinquennium, 1979-80 to 1983-84. In that same memorandum, Council recommended funding criteria for new graduate programs. As the first quinquennium ends on April 30, 1984, Council had intended to offer advice on criteria and objectives for the second quinquennium (1984-85 to 1988-89). However, the Minister, in her statement to the Legislature on December 15, 1983, announced the establishment of the "Commission on the Future Development of Universities of Ontario". The Commission has been asked to "produce a detailed overall plan to effect changes in the university system"[1], with one of its tasks being to examine the "approval of new programs and the retirement of existing programs both at the undergraduate and graduate levels."[2]

Given this part of the Commission's mandate, Council deems it inappropriate, at this time, to offer long-term advice concerning graduate program approvals. Council does, however, consider it appropriate to render interim advice on this matter so that while the Commission is operating there will be no uncertainty within the system about the process of program approvals.

Council, through its annual Spring Hearings and a special hearing with the Council of Ontario Universities (COU), has consulted widely with university representatives on the changes that should be made in the existing objectives and criteria for graduate program planning. Many of the suggestions made during this consultative process have been incorporated in the revised interim objectives and criteria which are outlined below.

Interim Objectives

The objectives established for the *first* graduate planning quinquennium were:

1. Recognition and protection of outstanding doctoral programs;
2. Support of good quality graduate programs;
3. Elimination of graduate programs of unsatisfactory quality;
4. Prevention of further duplication of graduate programs;
5. Recognition of high quality graduate programs in new fields of study for which there is a genuine need;
6. Maintenance of a satisfactory amount of scholarship and research activity in the university system.[3]

Council believes that these objectives, emphasizing as they do high academic quality and system rationalization, are generally still appropriate. It is in the public interest that all graduate programs funded by Government achieve and maintain high academic standards – programs which fail to "measure up" should not receive public funding. As noted in Advisory Memorandum 77-VII, the "funds which might otherwise flow to these programs should, in a period of consolidation, be used to bolster areas of existing strength".[4]

Graduate enrolment in Ontario, on a system-wide basis, has increased by 4.5% in 1982-83 over 1981-82, and by 10.6% from 1979-80, the year the present quinquennium began, to 1982-83 (see Table 1). As well, since 1979-80, there has been an overall increase in the number of graduate programs.

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1. Statement by the Honourable Bette Stephenson, M.D., to the Legislature, December 15, 1983, p. 12.
2. *Ibid.*, p. 18.
3. Ontario Council on University Affairs, A.M. 77-VII, *Fourth Annual Report*, 1977-78, p. 55.
4. *Ibid.*, p. 55.

Table I

Full-Time and Part-Time FTE Graduate Enrolment by Discipline Sector 1979-80 to 1982-83

		1979-1980	1980-1981	1981-1982	1982-1983	% Change 1979-80 to 1982-83
Education	FT	1,103	1,158	1,153	1,193	+ 8.2
	PT	998	983	925	938	- 6.0
Physical Education[1]	FT	182	213	140	131	- 28.0
	PT	26	23	13	17	- 34.6
Fine & Applied Arts	FT	256	300	314	282	+ 10.2
	PT	27	26	29	38	+ 40.7
Humanities & Related	FT	2,807	2,743	2,827	2,721	- 3.1
	PT	482	439	402	458	- 5.0
Social Sciences & Related	FT	5,797	5,869	6,124	6,323	+ 9.1
	PT	1,194	1,258	1,285	1,333	+ 11.6
Commerce & Business Related[1]	FT	1,786	1,895	1,947	2,061	+ 15.4
	PT	605	660	686	708	+ 17.0
Agriculture & Biological Science	FT	1,080	1,157	1,177	1,278	+ 18.3
	PT	57	64	63	65	+ 14.0
Engineering & Applied Sciences	FT	1,426	1,521	1,563	1,854	+ 30.0
	PT	317	313	301	332	+ 4.7
Engineering & Engin. Science[1]	FT	1,356	1,443	1,477	1,766	+ 30.2
	PT	312	309	297	325	+ 4.2
Health Professions & Occupations	FT	925	932	1,026	1,090	+ 17.8
	PT	114	106	109	133	+ 16.7
Mathematics & Physical Sciences	FT	1,416	1,470	1,825	1,940	+ 37.0
	PT	135	136	134	147	+ 8.9
Total[2]	FT	14,810	15,150	16,009	16,681	+ 12.6
	PT	3,324	3,325	3,248	3,444	+ 3.6
Not Applicable & Not Reported	FT	142	118	119	121	- 14.8
	PT	135	131	126	124	- 8.2
TOTAL FTE		18,411	18,724	19,502	20,370	+ 10.6

1. These enrolment figures are included in the sector totals immediately above.
2. These figures do not include "Not Applicable" and "Not Reported" student numbers.

Source: USIS #10100113, 110100114.

For some time Council has been concerned about the amount of program duplication in the system. For instance, in Advisory Memorandum 77-VII, Council stated that it expected that "elimination of duplication among existing programs may become an explicitly stated objective for the second quinquennial period."[5] The attendant public costs of maintaining unjustifiable duplication and, therefore, hindering institutional role differentiation cannot be defended, especially in a time of financial constraint when the resources to be deployed are limited. Council is convinced that institutions must be prepared to drop programs which duplicate other programs within the system unless:

a) there is a demonstrable regional need for the program, or
b) there is no evident excess capacity of places in other programs and there is a demand for graduates of the program.

At the same time, given the dynamic character of intellectual endeavour, Council expects that new programs in new fields of study will continue to be proposed. As long as these programs satisfy Council's criteria they should be funded.

Council continues to support the need to preserve and enhance high-quality research and scholarship. This is vitally important to the future industrial and cultural development of Ontario and Canada. Council has encouraged and continues to encourage the maintenance of a "satisfactory amount of scholarship and research activity" through its recommendations to Government on: the number and value of Ontario Graduate Scholarships; special grants for library and equipment funding; and new graduate programs to receive formula funding support.

While Council feels that the objectives for the first quinquennium remain basically sound, it also believes that some amendments to those objectives are in order. Council, therefore, proposes the following set of interim objectives for graduate planning:

- recognition and protection of outstanding and good quality doctoral and masters' programs;
- maintenance of a satisfactory level of scholarship and research activity in the university system;
- elimination of graduate programs of unsatisfactory quality;
- elimination of unjustifiable duplication among existing graduate programs;
- prevention of unjustifiable duplication by new graduate programs; and
- recognition of high quality graduate programs in new fields of study for which there is a genuine need and student demand.

Planning the Graduate Enterprise

Before recommending interim funding criteria for new graduate programs, Council wishes to review its role with respect to graduate program planning and to report on the outcome of its discussions with the Council of Ontario Universities (COU) concerning a "sectoral approach" to graduate planning.

Before Council was established in 1974 a process of graduate program planning was already in place, a process begun in 1966 with the publication of the report of the Commission to Study the Development of Graduate Programs in Ontario Universities (the "Spinks Report"). The Commission projected that in the near future there would be a substantial increase in graduate program enrolments and costs. Given the sizeable investment of public funds in the university system, such a development was expected to entail an increase in public expenditures. This led to Government insistence on a *planned* development for any expansion of the graduate enterprise. It became clear that "considerations of the public interest dictated

5. *Ibid.*, p. 56.

measures for the orderly accommodation of this enormous growth with full regard for fiscal responsibility and academic effectiveness".[6] In response to these Governmental and institutional concerns, COU established, in 1968, its Advisory Committee on Academic Planning (ACAP). Throughout its history, ACAP played a pivotal role in the planned development and assessment of graduate programs. In 1971, Government placed an embargo on the funding of new graduate programs. This action was taken because enrolment growth at the graduate level, from 1967 to 1970, reflected almost exactly predictions made in the "Spinks Report". When enrolment began to stabilize the embargo was gradually phased-out. For three years (1976-77, 1977-78 and 1978-79), graduate programs were funded by Government grants which were totally insensitive to changes in enrolment levels. Council had recommended this unusual suspension of the allocative formula for the following reasons:

> First, Council adopts as its own the concern expressed by the Commission on Postsecondary Education in Ontario that the long run future of universities, be they large or small, is not necessarily best served by a formula arrangement that associates both teaching and research costs with numbers of graduate students. Second, Council, as it made evident in Advisory Memorandum 75-IV, is abundantly aware of the need to ensure that the development of new graduate programs not take place at the expense of the financial viability of the university system as a whole. Third, in that this need indicates a rationing in the distribution of existing programs to permit new program development, Council wishes to ensure that whatever steering effects in the present formula encourage program proliferation be neutralized. Fourth, Council deems it highly desirable to foster an atmosphere at the level of Presidents and Boards of Governors in which the forward planning of graduate work within individual institutions can be freed from short-run revenue considerations. Fifth and finally, Council wishes to foster an atmosphere in which planning can proceed at the system-wide level in like freedom from such considerations.
>
> The above, rather than a concern over either the enrolment growth, which is currently moderate, or short-term economies to the Government, which will be marginal, are what have brought Council to advocate a suspension of the formula with respect to the funding of graduate work at this time.[7]

Council was hopeful that the university system could become self-regulating with regard to the graduate enterprise and, therefore, believed that this suspension would "allow institutions to make hard choices, including specifically the "possible reduction of established programs".[8] COU later commented, in relation to this period of formula suspension, that it was unfortunate that "the observed effects were not great".[9]

In recommending, in Advisory Memorandum 77-VII, the establishment of the first graduate planning quinquennium, Council stressed that it expected the universities to commit themselves to Council's overall goals of institutional role differentiation and system rationalization:

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6. Ontario Council on University Affairs, A.M. 75-IV, *Second Annual Report*, 1975-76, p. 29.
7. Ontario Council on University Affairs, A.M. 75-V, *Second Annual Report*, 1975-76, p. 35.
8. *Ibid.*, p. 36.
9. Council of Ontario Universities, Special Committee to Review Graduate Planning, *Discussion Paper*, June 1980, p. 6.

> Over the years there has been much discussion of institutional role differentiation and rationalization. The new era of streitened resources and declining graduate enrolments and the accompanying need for system-wide consolidation should encourage institutions to identify and give priority to the areas of graduate endeavour in which strength exists and which are key to the planned institutional identity.
>
> The success of the graduate planning enterprise during the first quinquennium will be primarily dependent upon the pursuit of excellence by institutions in their areas of strength, and, of system rationalization by the university collectivity on the basis of quality and need.[10]

During Council's annual public hearings in 1978, many institutions expressed the view that the Ontario university system lacked leadership in the area of graduate planning. Some institutions specifically requested that Council develop special incentives for institutions to close or merge graduate programs and to differentiate roles within the university system through internal program rationalization. Other institutions urged that Council be given executive authority by Government and that Council undertake to develop a system-wide graduate program plan.

Though the centralization of decision-making authority for post-secondary education had apparently worked well in certain jurisdictions, Council was convinced that it would be inappropriate in Ontario. Council recognized, however, that it had a responsibilty to raise questions and to suggest strategies which would serve to guide the graduate enterprise, particularly with regard to institutional role differentiation. To this end, Council elaborated on the concept of institutional role differentiation in *The Ontario University System: A Statement of Issues:*

> From its own perspective Council believes that considerable institutional differentiation already exists in Ontario. This is due in part to the way in which the universities evolved, and in part to the regulatory processes that have had a bearing on new program initiatives during the past decade. The current differentiation among institutions in Ontario occurs through a combination of disciplinary emphasis and breadth of instructional offerings. Some universities are known for particular disciplinary strengths, some for the breadth of professional schools and some for their regional or other character. Of course, there is duplication of programs in the system. To some extent this is necessitated by the nature of a university and the way in which Ontario's universities evolved as independent institutions. Council's concerns with unnecessary duplication at the graduate level have led it to encourage the system to examine and begin to resolve this problem during the first graduate planning quinquennium. Moreover, Council believes that there remains some scope for increased role differentiation among the universities based on disciplinary emphasis and level and range of instructional offerings.[11]

Council also outlined its role as one which involved:

> ...developing and advising the Government on general policy issues as well as specific matters, promoting liaison, and at the same time keeping some distance, between Government and the universities, and maintaining a public interest overview of developments in Ontario universities.[12]

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10. Ontario Council on University Affairs, A.M. 77-VII, *Fourth Annual Report*, 1977-78, p. 57.
11. Ontario Council on University Affairs, "The Ontario University System: A Statement of Issues", *Fifth Annual Report*, 1978-79, p. 35.
12. *Ibid.*, p. 42.

System Rationalization

In its paper entitled *System Rationalization: A Responsibility and an Opportunity* (September, 1980), Council emphasized the pressing need, especially in a time of economic constraint, for "institutional role differentiation" and "system rationalization".[13] These system-wide objectives for all aspects of institutional planning were felt to be particularly important at the graduate level, where associated costs and attendant public expenditures are proportionately much greater than at the undergraduate level. Council summarized its position, as follows:

> While university autonomy is desirable, there remains no option but for the universities to work together to preserve the high quality system that has developed in Ontario, especially given the constraints facing that system. Unnecessary duplication of graduate programs must be prevented and eliminated in order to protect existing strong programs and to ensure that opportunities exist for innovation. In addition, the universities must plan their graduate programs in relation to their strengths.[14]

Council endorsed program closures in discipline areas or sectors where universities did not have particular strength or where programs were of dubious quality or need. In order to maintain and enhance academic quality in the system, Council also endorsed other options, such as mandatory strengthening of programs, program mergers and the establishment of joint programs. All of these were intended to prevent or eliminate unjustifiable program duplication, strengthen the graduate enterprise on a system-wide basis and advance Council's broader goal of institutional role differentiation.

Council noted in *System Rationalization* that, although the institutions in the system were "already differentiated to a very great extent", it was necessary for each of them to recognize its own role as well as the roles of other universities within the system. Only in this way could the system develop with "each university channelling its initiatives in accordance with its role."[15]

The Sectoral Approach

In 1980, Council proposed, in *System Rationalization*, the sectoral approach to graduate program planning as a possible aid to role identification and recognition. Full-time equivalent (FTE) doctoral student enrolment was used as a preliminary, albeit imperfect, indicator of institutional strength. Institutions with at least 7.5% of the FTE doctoral enrolment in a given discipline sector were deemed to have "major involvement" in that sector, those with less than 7.5% were said to have "limited involvement", and those without enrolment in the sector were designated as having "no involvement".

New programs proposed for funding by an institution with major involvement in the sector in which the program was located were to be subject to only one of Council's funding criteria – that being that the programs would have to be appraised positively by COU. In the case of new programs in a sector where an institution had limited involvement, all of Council's funding criteria were to be satisfied. Where an institution did not have any enrolment in a sector, Council indicated it "would expect that the institution would not propose the introduction of any programs."[16]

Council recognized that enrolment was but one indicator of strength in a sector, and so invited COU to help in developing other indicators relating to the quality of faculty and students. Council was reluctant to alter any of the ground rules for the first graduate planning quinquennium (1979-80 to 1983-84), but felt it appropriate to

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13 Ontario Council on University Affairs, *Seventh Annual Report*, 1980-81, pp. 62-69

14 *Ibid.*, p. 65

15 *Ibid.*, p. 67

16 *Ibid.*, p. 69

begin discussions concerning the ground rules for the second quinquennium. It was thought that the sectoral approach might facilitate graduate planning in the second quinquennium in that it would have many benefits for individual institutions and for the system as a whole:

> First, each institution would be aware of the strengths of the others. Second, it would assist the institutions in their planning to the extent that they would be aware, at a very early stage, of which programs would be likely to receive positive funding recommendations. Third, it would do much to rationalize the system yet preserve a measure of institutional autonomy. The institutions would be free to plan programs in certain areas, provided each program was of high quality.[17]

Council engaged in a long round of discussions with COU concerning the sectoral approach. COU's work in developing criteria for defining sectors of strength was very helpful in refining the concept of the sectoral approach.

In June, 1982, Council received COU's response to the sectoral concept but, after careful consideration of COU's proposal decided that a sectoral approach to graduate planning should not be established. The faculty and student "quality" indicators which COU developed were useful, but unfortunately, in almost every instance, the "quality" indicators were "swamped" by the "quantity" indicators, i.e., the numbers of faculty and students. Small, high-quality doctoral programs in a sector were not given adequate weighting. Also, a university could be designated as having "major" involvement in a sector even though only one or two departments in that sector were actually strong. Yet, under this approach, the university, subject only to a satisfactory academic appraisal, could obtain funding for a program mounted in any discipline in that sector, regardless of the university's actual strength in a given discipline.

The sectoral approach exercise helped to sharpen Council's focus on the importance of furthering its graduate planning objectives within the context of system-wide goals of institutional role differentiation and system rationalization. Council remains convinced, however, that there are serious problems with the sectoral approach which cannot be overcome.

Originally Council had hoped that the sectoral approach would encourage institutions to concentrate their resources in areas of strength. Council remains committed to the concept of institutional role differentiation, but feels that strategies other than the sectoral approach must now be explored in order to attempt to preserve a high level of academic quality and vigour among programs at the graduate level. It is crucial that the universities, especially in a time of economic constraint, plan their graduate enterprises in relation to their established strengths.

Five-Year Graduate Program Plans

An important contribution to graduate planning can be made through institutional five-year plans. Before the beginning of the first quinquennium, Council received five-year graduate program plans from each university. Subsequently, COU "made the point to Council that it would be useful for the universities to have some comments from Council"[18] about the program proposals contained therein. Council responded in a letter from the Chairman to the Chairman of COU. Council commented on 46 of the 85 programs proposed by the institutions. Though Council's response in 1980 to the institution's five-year plans was only one of many factors

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17. *Ibid.*, p. 69
18. *Ibid.*, p. 65

influencing a university's decision whether to proceed with a program, it is interesting to note that of the 46 program proposals which Council found to be questionable, 23 were withdrawn, 15 are currently being appraised and 8 were eventually submitted to Council for funding approval.

Council last year asked the institutions to provide it with new preliminary five-year plans, and will soon be asking the universities to confirm whether these plans can be regarded as their official plans. Council considers five-year plans to be of great value: a) to each institution, by encouraging careful examination of offerings in relation to strengths; b) to other institutions, by informing them of the possible introduction of new programs; and c) to Council, by providing an overview of the development of the system as a whole. Council intends to react to these plans in order once again to "aid the institutions in their planning to the extent that they could avoid committing resources to a program which had little likelihood of receiving funding approval."[19]

Council will consider for funding only programs that are outlined in the five-year plans, recognizing, however, that universities will need to update these plans annually. As indicated in its list of interim objectives, Council is interested in seeing the "elimination of unjustifiable duplication among existing programs". Therefore, the annual five-year plans also contain a list of proposed changes in existing programs, including any major adjustments of enrolment targets and planned deletions of any existing fields or programs.

Council will scrutinize the five-year plans of all institutions with great care since graduate offerings have a profound steering effect on an institution's overall identity. Council will indicate any modifications to these plans which it deems appropriate. This process of dialogue between Council and the institutions should be beneficial for all parties concerned.

Interim Criteria for Funding New Graduate Programs

The funding approval criteria established for the *first* graduate quinquennium were:

1. Evidence of need in Ontario and Canada to be provided by the Advisory Committee on Academic Planning and endorsed by the Council of Ontario Universities;
2. Certification from the Advisory Committee on Academic Planning through the Council of Ontario Universities that no similar program in the field(s) proposed is available in Ontario. (In exceptional circumstances, Council may be willing to entertain a recommendation from ACAP through COU for funding a master's program where there is a similar program in Ontario, but where there is also strong evidence of regional importance and student demand);
3. Certification from the Advisory Committee on Academic Planning through the Council of Ontario Universities that the proposed program has passed a rigorous appraisal and at the time of appraisal was not found to require improvements;
4. Certification from the institution that admissions to the program commenced prior to its being proposed for funding consideration.[20]

In light of Council's experience, several of these criteria need to be revised. Council has consistently emphasized, for example in Advisory Memorandum 77-VII, that it

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19. *Ibid.*, p. 65.
20. Ontario Council on University Affairs, A.M. 77-VII, *Fourth Annual Report, 1977-78*, p. 58.

would, in considering new programs, be concerned about "balancing...fiscal realities and new initiatives".[21]

Council clarified this statement for COU as meaning whether a program "should be offered and funded despite financial constraint".[22] Council also indicated to COU, in Advisory Memorandum 79-VII, that it required a statement on whether a new program was "consistent with the aims, objectives and existing strengths" of the institution offering the program.[23] As noted in Advisory Memorandum 81-VII, COU was unable to forward statements to Council on the above two matters. In fact, COU's Special Committee to Review Graduate Planning indicated COU's general inability to apply Council's funding criteria:

> Experience has shown that COU, given its nature, being representative of the institutions, cannot effectively deal with the review of programme proposals according to a set of planning criteria which it has not established itself.[24]

Council's Academic Advisory Committee, as described in Advisory Memorandum 81-VII, now advises Council on the funding criteria, while COU restricts itself to informing Council on whether a program has been successfully appraised.

Council believes that the concepts of "institutional appropriateness" and "funding despite a climate of financial constraint" should become specific criteria for funding approval, along with Council's previously outlined requirements with regard to a new program's inclusion in a university's five-year plan.

Council continues to hold that a demonstrable commitment by an institution to a proposed program should be evident. Council's present criterion 4, requiring that there be students enrolled in the program before it is forwarded to Council for funding approval, was designed to ensure that demonstrable commitment existed. There has, however, been considerable criticism of this criterion. Some within the system feel that it dampens program initiatives to an undesirable degree by forcing a university to make a commitment to students in a program without any guarantee of viable funding for the program. From Council's perspective, the fact that there are students already enrolled in the program may sometimes make it more difficult for Council to reject a program proposal. Council holds that, on balance, this criterion has not worked entirely to the advantage of any of the parties concerned. Council is, therefore, recommending that this criterion be dropped. A university will still have to make a significant commitment to a program in terms of teaching-staff and library and other resources. If this commitment has not been made, a program will presumably not pass COU's academic appraisal process, and so will not be forwarded to Council for funding approval.

Council does not believe that by removing this criterion there will be more programs proposed than might otherwise have been developed. The process of dialogue associated with the five-year plans should ensure that an institution receives an early indication of Council's reaction to a particular program proposal, and Council would, therefore, expect an institution to amend or pursue its plans accordingly.

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21. *Ibid.*, p. 59.
22. Letter from Dr. W.C. Winegard to Dr. E.J. Monahan, October 30, 1979.
23. Ontario Council on University Affairs, A.M. 79-VII, *Sixth Annual Report*, 1979-80, p. 83.
24. COU Special Committee to Review Graduate Planning, *Final Report*, March 1981, p. 16.

With all of the above considerations in mind, Council accordingly *recommends to the Minister:*

OCUA 83-19
INTERIM FUNDING CRITERIA FOR NEW GRADUATE PROGRAMS COMMENCING MAY 1, 1984.

THAT, in line with the considerations set out in this Memorandum, new graduate programs be considered for funding approval on the advice of Council, with such advice based on the following criteria:

1. That the program has passed a rigorous academic appraisal, as certified by the Council of Ontario Universities (COU), and at the time of appraisal was not found to require improvements.
2. That there is evidence of societal need and student demand for the program in Ontario and/or Canada.
3. That the proposed program does not duplicate an existing program in Ontario unless the institution proposing the new program demonstrates to Council's satisfaction that exceptional circumstances obtain such that Council should recommend the program for funding despite the duplication involved.
4. That the program is consistent with the aims, objectives and existing strengths of the institution offering the program, and is included in the institution's five-year plan.
5. That the program is deserving of funding even in a time of economic constraint.

Funding Approval Process

I. *Council of Ontario Universities*
Council relies on COU to subject each new program to a rigorous academic appraisal. Council will require COU to notify it at the same time as COU notifies an institution that a program has been appraised successfully. Council would continue to expect the Ontario Council on Graduate Studies (OCGS) to forward both an annual report to Council on graduate program planning and a set of annual graduate program macro-indicators, and to cooperate with Council's Academic Advisory Committee in ensuring that the academic appraisals process continues to be rigorous and credible.

II. *The University*
After a successful appraisal, each university is responsible for submitting its program proposals directly to Council.

With regard to the second funding criterion, Council will require a university to provide evidence to Council of the need for a program.

Council is prepared to accept that there may be cases of justifiable program duplication. Therefore, in applying the third criterion, Council will entertain compelling arguments from a university that exceptional circumstances may obtain with respect to a specific program proposal such that apparent duplication of an existing program is justifiable.

The program funding submission should provide sufficient commentary and documentation to enable Council to determine whether criteria two, three and four have been met. Specifically with respect to the annual five-year graduate plans, each should include:

a) a list of new programs that are being planned for implementation within the next five years. Only those program proposals that have

reached the point of being considered by the Senate or another university-wide body concerned with graduate programming should be listed. For each program, a brief outline of its content and the perceived need for the program should be included;

b) a list of existing programs for which major changes are planned in enrolment or program emphasis, such as the introduction of a new field within an existing program; and

c) a list of programs or fields which may be discontinued.

III. *Ontario Council on University Affairs*
Council's Academic Advisory Committee will review each program proposed and submit advice to Council. Council, taking into account the Committee's advice on the first four criteria, will determine whether the fifth criterion has been met and will then formulate its advice to the Minister.

Schedule of Program Approvals
Council has developed the following schedule for program approvals. If a program is submitted to Council by August 1 in any given year, Council will make every effort to submit a recommendation to the Minister by February 1 of the following year. If recommended positively, enrolment eligibility for funding of the program should commence beginning in the subsequent fiscal year. Council will submit its advice on program funding only once each year – on or before February 1.

Interim Criteria for Continued Funding of Existing Graduate Programs
In the first quinquennium emphasis was placed on meeting the quinquennial planning objectives through the process of funding approval of new programs, though universities were encouraged to examine their existing programs in light of their strengths.

Many existing graduate programs have never been appraised because they were introduced prior to the establishment of an appraisals process. This situation is being addressed by COU, in that it has instructed its Appraisals Committee to conduct appraisals of all existing programs on a periodic basis over a seven-year cycle, and to begin with those programs which have not previously been appraised. When by this process programs are identified as being of unacceptable quality, Council understands that this information will be sent by COU to Council with a recommendation that funding be discontinued. After a period of two years, such programs could be resubmitted to COU for appraisal, but only on the same basis as a completely new program.[25] Council welcomes this initiative on the part of COU, and has instructed the Academic Advisory Committee to monitor the effectiveness of this process and advise Council annually on its findings.

As Council's revised list of objectives indicates, Council is committed to the elimination of unjustifiable duplication among existing programs. While it is true that new programs generate new funding, and so affect the basic income unit value and the deployment of capital, library and other resources within the system, existing programs also affect these deployments, often in more substantial ways. Strong, much needed new program initiatives should not be dampened by the presence, in some instances, of existing programs of dubious quality or need. All of these problems and concerns are, of course, exacerbated in the existing climate of financial constraint and make the need for action in this area all the more pressing.

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25 Council of Ontario Universities, *Graduate Studies in the Second Quinquennium: A Submission to OCUA*, October, 1983, pp. 5–7 and p. 11.

In coming to grips with the problem of unjustifiable program duplication, Council will, therefore, rely considerably on the new COU appraisals process and on the advice of Council's Academic Advisory Committee with respect to the existing array of graduate program offerings.

With all of the above considerations in mind, Council accordingly *recommends to the Minister:*

> *OCUA 83-20*
> *INTERIM FUNDING CRITERIA FOR EXISTING GRADUATE PROGRAMS COMMENCING MAY 1, 1984.*
>
> *THAT,* in line with the considerations set out in this Memorandum, existing graduate programs continue to be funded, unless Council advises that funding be withdrawn on the basis of the program failing:
>
> a) to be of acceptable academic quality, as certified by the Council of Ontario Universities (COU), and/or,
>
> b) to meet a justifiable need.

Conclusion

It is hoped that these new funding criteria will promote Council's overall system-wide goals of institutional role differentiation and system rationalization, and specifically will assist in the achievement of Council's particular objectives for the graduate area.

M. Paikin
Acting Chairman
January 20, 1984

83-IX The Allocation of the Government's Operating Support for the University System in 1984-85

The Minister of Colleges and Universities informed Council on December 16, 1983 that, for 1984-85, a maximum of $1,185.5 million in operating grants will be made available for the university system. Of this amount, $1,176.4 million is available for Council's basic funding objectives and the grant-in-aid for the Bar Admission Course. In response to Council's Recommendation 83-12, $4.0 million of the remaining grants is provided as additional funds to cover the incremental costs of existing bilingualism activity. The final $5.1 million is retained by the Ministry of Colleges and Universities for line budget items.

In addition to the operating grants announcement, the Minister also announced that "formula tuition fee rates for all students in Ontario universities will rise by 5% in 1984-85",[1] and asked "universities to ensure that institutional tuition fees reflect this policy, increasing by no more than 5% over the 1983-84 levels".[2] These policies apply to both domestic and visa students. By applying the increase in formula fee rates to Council's revised estimate of 1984-85 total student enrolment (an estimated 2.8% increase, as indicated in Advisory Memorandum 83-IVA), an estimated $13.0 million in additional formula fee revenue is yielded.

Based on the above estimate of the increase in formula fee revenue and the estimated 2.8% increase in enrolment, total grant and fee revenue accruing to the university system in 1984-85 is expected to be $1,472.3 million. This represents a 5.8% or $80.5 million increase over 1983-84.[3]

In December 1983, Council updated its 1984-85 funding advice by submitting Advisory Memorandum 83-IVA. This updated advice reduced by $8.5 million the amount recommended for operating grants in Advisory Memorandum 83-IV. This advice reflects what Council believes will be the effect on the university system of *An Act to Provide for the Review of Prices and Compensation in the Public Sector and for an orderly Transition to the Resumption of full Collective Bargaining.*

The estimated total revenue available for Council's basic funding objectives in 1984-85, including the $1,176.4 million in operating grants designated for Council's basic funding objectives and the estimated $13.0 million from the formula fee rate increase, falls $9.0 million short of Council's revised basic funding objectives. The estimated total revenue available to the university system in 1984-85, including the $4.0 million grant for funding the incremental costs of bilingualism, falls $21.7 million short of Council's revised total recommendation for operating support, which was $1,541.0 million ($1,524.3 million for basic funding objectives; $0.74 million for the grant-in-aid for the Bar Admission Course; $4.0 million for the funding of existing bilingualism programs; and $12.0 million for additional funds for equipment and library acquisitions).

The Minister of Colleges and Universities also informed Council that the 1984-85 formula operating grants will be distributed differently than in previous years, stating that "...each institution's grant will consist of two-thirds of its grant calculated

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1. Letter from the Honourable Dr. B. Stephenson, Minister of Colleges and Universities, to Mrs. M. Paikin, dated December 16, 1983.
2. *Ibid.*
3. The 1983-84 grants figure used in this calculation includes the $12.0 million special grant towards expenditures on equipment for use in teaching undergraduates and on library equipment and acquisitions.

with the current formula and one-third of its grant calculated with a new formula."[4] Further, Council is instructed to "make appropriate adjustments to the distribution to ensure that no institution receives less than a five percent increase over its 1983-84 formula grant".[5] The Minister's description of the "new formula", which comprises one-third of the 1984-85 formula grants allocation, can be found in Appendix B of this memorandum.[6]

In this memorandum, Council presents its advice on the distribution of the $1,180.4 million that has been made available for Council's 1984-85 operating grant allocation. This advice includes recommendations on the allocation of differentiation grants, Northern Ontario grants, bilingualism grants, grant-in-aid for the Bar Admission Course, a provision for the minimum 5% increase in formula grants, a provision for final enrolment adjustment, and the distribution by the Minister's announced formula of the funds remaining after the above allocations.

Differentiation Grants

Council's Advisory Memorandum 80-VI established differentiation grants as a new category of extra-formula funding intended to assist institutions which accept a clearly differentiated role, demonstrate their intention to pursue their academic strengths efficiently and effectively, and require special funding to do so. Trent University is the only institution to have received a differentiation grant.

Over the past three years, Trent has been awarded differentiation grants: in recognition of its continued efforts to solidify its differentiated role as the only institution in the Ontario university system engaged almost exclusively in undergraduate Arts and Science education; in approval of its realignment of its limited graduate offerings to complement its academic strengths; and in acknowledgement of its improved management of resources and expenditures.

Trent's ongoing implementation of the academic and fiscal principles which it has adopted with regard to undergraduate and graduate programming and to deficit reduction, respectively, continues to meet with Council's approval. Accordingly, Council *recommends to the Minister:*

> *OCUA 83-21*
> *DIFFERENTIATION GRANT FOR TRENT UNIVERSITY 1984-85*
>
> *THAT* a differentiation grant of $1,500,000 be made to Trent University in 1984-85.

Council reiterates its position that the recommended level of any future differentiation grant will be determined as a result of a review of the existing circumstances of the institution.

Northern Ontario Grants

In Advisory Memorandum 80-VI, Council indicated that it anticipated undertaking a thorough review of Northern Ontario grants. Each year since that time, Council has postponed this review because of uncertainty concerning the future delivery of university-level education in Northeastern Ontario. Council continues to believe that it would be inappropriate to undertake a review of the Northern Ontario grants until

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4 Letter from the Honourable Dr. B. Stephenson, Minister of Colleges and Universities, to Mrs. M. Parkin, dated December 16, 1983.

5 *Ibid.*

6 See Ministry of Colleges and Universities, *Operating Formula Manual*, November, 1983, pp. 28-31, for a description of the current formula.

the structure for the delivery of university-level education in Northeastern Ontario is finalized.

For 1984-85, the value of the Northern Ontario grants for Lakehead and Laurentian universities, and Laurentian's affiliated colleges, is calculated according to the "mini-formula" outlined in Advisory Memorandum 75-VII. On the basis of that formula, each grant is determined with reference to the prior year's Basic Operating Income of each institution. Accordingly, Council *recommends to the Minister:*

OCUA 83-22
NORTHERN ONTARIO GRANTS 1984-85

THAT Northern Ontario grants in 1984-85 be made in the following amounts:

Lakehead	$2,233,000
Laurentian	2,158,000
Algoma	191,000
Laurentian (Algoma)	29,000
Nipissing	404,000
Laurentian (Nipissing)	45,000
Hearst	101,000
Laurentian (Hearst)	15,000

Bilingualism Grants

Using 1981-82 cost data, Council recently completed its second study of the incremental costs associated with bilingualism in Ontario universities.[7] Details of the costing method adopted by Council and the results of the study for 1981-82 for each institution are given in Appendix A of this Memorandum. These results update and replace Council's 1976-77 bilingualism cost study results.[8]

The new study indicates that the total cost of existing bilingualism activities in 1981-82 was $11.072 million. When escalated by the percentage increases in operating grants for 1982-83 and 1983-84, the estimated 1983-84 incremental costs of bilingualism are $13.354 million. This exceeds the bilingualism grants' allocation for 1983-84 by $4.103 million. Anticipating the approximate level of this shortfall on the basis of preliminary cost study results, Council took initial corrective measures at the time it submitted its funding level advice for 1984-85. Additional funding of $4.0 million for bilingualism in 1984-85 was recommended in Advisory Memorandum 83-IV as an initial step in recognition of the documented incremental costs of existing bilingualism programs. Council now estimates that the incremental costs of existing bilingualism activity in 1984-85 will be $14.169 million.[9]

It is Council's intention that the distribution of the costs of bilingualism among institutions in 1981-82 should form the basis for bilingualism grant allocation for a 4 to 6 year period. At the end of this period bilingualism costs would again be reviewed to determine the appropriate level and distribution of grants for a subsequent period.

As noted above, in response to Council's recommendation, the Minister announced on December 16, 1983 that an additional $4.0 million is to be provided from the global allocation for the incremental costs of bilingualism. As a result, the total bilingualism grants available for distribution for 1984-85 are equal to: (i) the total bilingualism grants for 1983-84 increased by 6.1%, which is the percentage by which ongoing operating grants increase between 1983-84 and 1984-85, excluding the additional $4.0 million for bilingualism; and (ii) the $4.0 million in additional

7. See Advisory Memorandum 83-IV for a brief description of the history of this study and of Council's previous study.
8. See Advisory Memorandum 77-VI for details on Council's first bilingualism cost study.
9. This is derived by increasing the 1983-84 estimate by 6.1%, the percentage increase in total ongoing operating grants exclusive of new allocations (i.e. the $4.0 million in additional bilingualism grants).

funds. This $13.814 million is allocated according to the incidence of the 1981-82 incremental bilingualism costs.

Accordingly, Council *recommends to the Minister:*

OCUA 83-23
BILINGUALISM GRANTS 1984-85

THAT bilingualism grants in 1984-85 be made in the following amounts:

Ottawa	$9,904,000
Laurentian	2,015,000
Glendon	832,000
Hearst	106,000
Sudbury	129,000
St. Paul	828,000

Bar Admission Course

In recent years, Council has recommended that the grant-in-aid for the Bar Admission Course be increased by the same percentage as that accorded the university system as a whole. Council continues to apply this policy for 1984-85 and proposes that the grant-in-aid for the Bar Admission Course be increased by 6.1%, which is the percentage increase in ongoing operating grants between 1983-84 and 1984-85, excluding the additional $4.0 million for bilingualism. Council accordingly *recommends to the Minister:*

OCUA 83-24
GRANT TO THE LAW SOCIETY OF UPPER CANADA ON BEHALF OF THE BAR ADMISSION COURSE 1984-85

THAT a grant of $727,000 be made to the Law Society of Upper Canada for support of the Bar Admission Course in 1984-85.

Basic Income Unit Values

Of the $1,180.4 million available for distribution in 1984-85, Council has recommended that $21.217 million be made available for Northern Ontario, bilingualism, and differentiation grants, and for the grant-in-aid for the Bar Admission Course. In addition to these deductions, shown in Table I, $2.253 million has been set aside by Council as the provision for final enrolment adjustment and the provision for a minimum 5% increase in formula grants. Of this amount $1.055 million is intended to offset any discrepancy between the estimated weighted enrolment for 1983-84 and the final enrolment figure, and $1.198 million is set aside for special grants to raise the formula grants of those institutions whose 1984-85 formula grants increased by less than 5% over their 1983-84 formula grants to 105% of their 1983-84 level. The amount remaining for distribution by formula is $1,156.930 million. It should be noted that the unused portions of the provisions for final enrolment adjustment and the 5% minimum increase in formula grants will also be distributed according to the funding formula announced by the Minister of Colleges and Universities.

Table I

Availability of Funds for Distribution as Formula Grants for 1984–85

Available for Council's Allocative Recommendation		$1,180,400,000
Deduct:		
Northern Ontario Grants	$ 5,176,000	
Bilingualism Grants	13,814,000	
Differentiation Grants	1,500,000	
Bar Admission Course	727,000	
Sub-Total	21,217,000	
Provision for final enrolment adjustment	1,055	
Provision for a 5% increase in formula grants	1,198	
Available for distribution as Formula Grants		$1,156,930,000

As noted above, two-thirds of the 1984-85 formula grants are to be distributed according to the current formula and one-third of the formula grants are to be allocated according to the new formula announced by the Minister of Colleges and Universities. This has been accomplished by calculating the distribution for the entire $1,156,930 million in formula grants twice, according to each of the formulas. The resulting two formula grant figures for each institution (one calculated under the current formula and the other calculated under the new formula) have been multiplied by their respective shares of total formula grants (two-thirds and one-third) and added together to arrive at each institution's formula grant.

Under the current formula, the value of the undergraduate Basic Income Unit (BIU) is $4,009 and the graduate BIU value is $3,908. The undergraduate allocation is calculated in accordance with the undergraduate funding formula established in Advisory Memorandum 76-VII. The graduate BIU allocation is calculated according to the method specified in Advisory Memorandum 78-III.

Under the new formula, the value of the Base BIU is $3,034 and the Moving-Average BIU value is $949. The base allocation and moving-average allocation are calculated in accordance with the new formula described in Appendix B of this memorandum.

Accordingly, Council *recommends to the Minister:*

OCUA 83-25
GRADUATE AND UNDERGRADUATE BIU VALUES UNDER THE CURRENT FORMULA FOR 1984-85

THAT for 1984-85, the graduate BIU value be not less than $3,908 and the undergraduate BIU value be not less than $4,009.

OCUA 83-26
BASE AND MOVING-AVERAGE BIU VALUES UNDER THE NEW FORMULA FOR 1984-85

THAT for 1984-85, the base BIU value be not less than $3,034 and the moving average BIU value be not less than $949.

Table II summarizes the distribution of grants based on the recommendations contained in this memorandum. It documents, by institution, the formula and non-formula grants recommended by Council for 1984-85, along with the grant totals for 1983-84 and the percentage increases in grants between the two years.

M. Paikin
Acting Chairman
January 20, 1984

Distribution of Grants Generated by Recommendations in Advisory Memorandum 83-IX
($000)

1984–85 Recommendations

	Formula Grants	Northern Ontario Grants	Bilingualism Grants	Differentiation Grants	Special Grants & Final Enrolment Adjustment	Total Grants Recommended	1983–84 Total Grants	% Change
Brock	21.563					21.563	19.576	10.2
Carleton	57.013					57.013	53.857	5.9
Guelph	69.820					69.820	65.913	5.9
Lakehead	18.141	2.233				20.374	18.823	8.2
Laurentian	17.094	2.158	2.144			21.396	19.553	9.4
Algoma	1.296	191				1.487	1.362	9.2
Laurentian (Algoma)	270	29				299	223	34.1
Nipissing	3.092	404				3.496	3.096	12.9
Laurentian (Nipissing)	425	45				470	340	38.2
Hearst	324	101	106			531	483	10.0
Laurentian (Hearst)	144	15				159	88	80.7
McMaster	76.434					76.434	72.304	5.7
Ottawa	88.067		10.732		243	99.042	91.321	8.5
Queen's	80.083					80.083	76.054	5.3
Toronto	255.849				596	256.445	244.233	5.0
Trent	11.634			1.500		13.134	12.247	7.2
Waterloo	89.371					89.371	84.609	5.6
Western	120.253					120.253	114.004	5.5
Wilfrid Laurier	22.911					22.911	21.489	6.6
Windsor	49.942					49.942	46.955	6.4
York	99.497		832			100.329	90.741	10.6
OISE	15.932				90	16.022	15.259	5.0
Ryerson	50.444				244	50.688	48.274	5.0
OCA	7.217				22	7.239	6.895	5.0
Dominican	114				3	117	111	5.6
Total	1.156.930	5.176	13.814	1.500	1.198	1.178.618	1.107.810	6.4
Bar Admission					727			
Final Enrolment Adjustment					1.055			

Notes:

1 Dominican College receives 50% funding. The theology schools receiving 100% funding are included with the parent institution.

2 Bilingualism grants for affiliated institutions are included with the parent institutions.

3 Special grants include the grants required to increase institutions' formula grants by 5% over the previous year and the grant-in-aid for the Bar Admission Course.

Appendix A

METHODOLOGY FOR THE CALCULATION OF THE INCREMENTAL COSTS OF BILINGUALISM

In its study of the 1981-82 incremental costs of bilingualism, Council identified six components of the incremental costs of bilingualism. They are as follows:

a) supplementary course offerings,
b) second language training,
c) library operations,
d) translation services,
e) publishing, printing, stationery and supplies, and
f) administrative staff.

A description of the method adopted for calculating the costs included in each of these components is given below. Results of the study for each institution are shown in Table A.

a) Supplementary Course Offerings

Supplementary course offerings are those courses, or sections of courses, whose existence is directly traceable to the bilingual nature of the institution. Actual supplementary courses/sections are those which would not be offered by a unilingual institution with the same size student body. These will occur in one of the following ways:

i) *Parallel Supplementary Course Offerings* exist when the same subject material is being taught in both English and French on the same campus in a given academic year. Language courses are excluded from the definition of parallel courses and no incremental costs are attributed to sections of parallel courses that are produced by normal sectioning practices.

ii) *Non-Parallel Supplementary Course Offerings* exist when different subject material is being taught but the course is one which is being offered in order to provide an "adequate" range of courses in either English or French. No incremental costs are attributable to: a) non-parallel courses which would be offered by a unilingual institution with the same size student body, or b) non-parallel courses/sections where the students could not have been accommodated in other non-supplementary courses in the same discipline area at the same level (offered in the same language).

For both parallel and non-parallel supplementary courses, the following types of course sections are *not* included in the study: (i) multiple course sections — only one section of a minority language course is considered to have incremental costs associated with it, (ii) "directed studies" and one-student courses that are not required or compulsory courses, and (iii) Translation courses. For non-parallel supplementary courses, course sections that are equal to or greater than the average section size of the institution's non-supplementary courses at the same year level are excluded from the study.

For both types of courses, the incremental faculty cost is derived by dividing the total number of supplementary courses/sections by 3.0 (the average teaching load of all institutions' full-time faculty) and multiplying by the average faculty salary (exclusive of fringe benefits and excluding medicine). The incremental academic support staff costs are obtained by applying to the total costs of all teaching assistants, technicians and clerk-typists the following ratio: actual supplementary courses/sections over the total number of courses offered.

b) Second Language Training
The incremental cost of second language training is limited to the institution's expenditures on second language training for: i) students, where that training is provided *via* non-credit courses, and ii) faculty and staff.

c) Library Operations
The costs of bilingualism relating to library operations have two elements: book costs and cataloguing costs. Incremental book costs are derived by comparing the proportion of total purchasing and binding costs (including ordering and processing) of books and periodicals in each bilingual institution's minority language with the corresponding proportion at a comparable unilingual institution. When the difference between the proportions is applied to the total cost of books and periodicals purchased and bound at the bilingual institution, the incremental book costs as a result of bilingualism are calculated. Incremental cataloguing costs have been determined as involving:

i) extra catalogue cards purchased because of bilingualism, and

ii) expenditures on the translation of library cards.

d) Translation Services
The expenditures of the institution's central translation department, expenditures on external translation services, and expenditures of academic departments on French-English and English-French translations of specified documents are deemed to be incremental costs.

e) Publishing, Printing, Stationery and Supplies
Each institution's estimate of additional expenditures on publishing, printing, stationery and supplies as a result of bilingualism is deemed a reasonable measure of the incremental cost.

f) Administrative Staff
The total costs deemed to be incremental are as follows:

i) the cost of extra staff required to provide bilingual services, and

ii) salary differentials for bilingualism paid to staff who must be bilingual to perform their function.

Table A

Incremental Costs of Bilingualism in Designated Ontario Universities, 1981–82
($)

	Ottawa	St. Paul	Laurentian	Sudbury	Hearst	Glendon (York)
Supplementary Course Offerings	4,306,925	547,902	1,055,074	78,515	46,062	455,690
Second Language Training	120,203	—	8,357	—	—	5,368
Library	289,835	36,120	114,581	10,533	6,025	53,788
Translation Services	79,132	1,058	73,723	—	5,000	8,069
Publishing, Printing, Stationary and Supplies	548,350	13,351	119,193	5,170	9,563	16,232
Administrative Staff	2,592,914	65,490	243,981	9,485	17,996	127,963
Total	7,937,359	663,921	1,614,909	103,703	84,646	667,110

Appendix B

THE NEW FORMULA[1]

Description

The new formula will consist of two components. The first component provides for the distribution of 75% of the sum total of formula operating grants and formula fees (BOI) in accordance with "Base BIUs". The Base BIUs of an institution will consist of one-half of the average of the BIUs of 1974-75, 1975-76 and 1976-77 and one-half of the average of the three years with the highest number of BIUs between 1974-75 and 1982-83. This method of determining base units recognizes the established role of three-year base of the current formula and takes into account some measure of the enrolment capacity of each institution.

The second component provides for the distribution of the remaining 25% of BOI in accordance with the average number of BIUs in the three years immediately preceding the funding year. The "moving average" makes the allocation responsive to changes in enrolment, although in a much dampened way relative to current arrangements.

Separate BIU values for undergraduate and graduate levels will be abolished for the new formula. Instead, two new BIU values, one for base BIUs and the other for moving average BIUs, will apply equally to both undergraduate and graduate levels.

Method of Calculation for 1984-85:

1. *Calculate BIUs and Formula Fees*

   a) Base

   $$\frac{1}{2}\left(\frac{1974\text{–}75 + 1975\text{–}76 + 1976\text{–}77}{3}\right) + \frac{1}{2}\left(\frac{M}{3}\right)$$

   where M = Sum of three years with the highest number of BIUs between 1974–75 and 1982–83

   b) Moving Average:

   $$\frac{1981\text{–}82 + 1982\text{–}83 + 1983\text{–}84}{3}$$

2. *Calculate Total BOI*

   – apply discounting rates to Base and Moving Average

   Total BOI = b (Grants + Base Fees) + m (Grants + Moving Average Fees)

   = Grants + b (Base Fees) + m (Moving Average Fees)

   Where: b + m = 1

   b and m are the discount rates (0.75 for the base and 0.25 for the moving average)

   b = proportion of total grants and formula fees allocated according to the base BIUs

   m = proportion of total grants and formula fees allocated according to moving average BIUs

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1. Attachment to the letter from the Honourable Dr. B. Stephenson, Minister of Colleges and Universities, to Mrs. M. Paikin, dated December 16, 1983.

3. *"Splitting the Pot" between Base and Moving Average BOI*

   a) Base:

   - apply the base discount rate to total formula grants and base formula fees

   Base BOI = (Grants + Base Fees)

   b) Moving Average:

   - apply the moving average discount rate to total grants and moving average formula fees

   Moving Average BOI = m (Grants + Moving Average Fees)

4. *Determine Unit Values*

   a) Base:

   - divide base BOI by Base BIUs

   $$\text{Base Unit Value} = \frac{\text{Base BOI}}{\text{Base BIUs}}$$

   b) Moving Average:

   - divide moving average BOI by moving average BIUs

   $$\text{Moving Average Unit Value} = \frac{\text{M.A. BOI}}{\text{M.A. BIUs}}$$

5. *Allocate Institutional BOI*

   - multiply each institution's base and moving average BIUs by their respective BIUs values

6. *Determine Institutional Formula Grants*

   - subtract discounted formula fees from institutional BOI

   Grants = BOI – b (Base Fees) – m (Moving Average Fees)

83-X Undergraduate Quasi-Professional Program Funding – Mathematics for Commerce (Honours BA), York University; Music History (BA), Queen's University; Behavioural Neuroscience (BSc), Laurentian University

In this memorandum Council offers advice on three new undergraduate quasi-professional programs. They were considered in accordance with the procedures set out in Advisory Memorandum 82-VII.

Mathematics for Commerce (Honours BA), York University
Council dealt directly with this proposal without referral to its Academic Advisory Committee. York already offers an ordinary program in Mathematics for Commerce. Some students in the ordinary program suggested they wanted to pursue their studies in greater depth so as to be able to compete more effectively for employment and graduate work opportunities in operations research and statistics. The honours program would appear to fill a recognizable societal need and student demand. York indicates that the honours program will not involve the addition of new courses or new faculty and that current library and computer facilities will not have to be expanded. York projects an enrolment of 100-150 students per year with some corresponding decrease in the numbers enrolled in the ordinary program.

Council is satisfied that the program should be funded even in a time of economic restraint and, accordingly, Council *recommends to the Minister:*

> *OCUA 83-27*
> *FUNDING FOR THE HONOURS BACHELOR'S PROGRAM IN MATHEMATICS FOR COMMERCE AT YORK UNIVERSITY BEGINNING IN 1985-86*
>
> *THAT* the Honours BA program in Mathematics for Commerce at York University be deemed eligible for formula support beginning in 1985-86, and that eligible enrolment, from 1984-85 on, be included in the moving average for the university.

Music History (BA), Queen's University
This program was referred to the Academic Advisory Committee for advice.[1] Council concurs with the Committee's view that this program should be viewed as a core Arts and Science program and should, therefore, be funded automatically.

Behavioural Neuroscience (BSc), Laurentian University
This program was referred to the Academic Advisory Committee for advice.[2] Council endorses the Committee's comments with respect to its concerns regarding the match between the curriculum and the original program title. Council also endorses the Committee's recommendation that the program not be regarded as quasi-professional, and that it should, therefore, be funded automatically as a core Arts and Science program. The fact that the program is not quasi-professional will have to be taken into account in the promotion of the program by Laurentian.

M. Paikin
Acting Chairman
February 17, 1984

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1. See Appendix A.
2. See Appendix B.

Appendix A

Major Concentration in Music History, B.A. (Honours), Queen's University
At the moment, Queen's University offers minor and medial concentrations in Music History. Appendix "A" of Advisory Memorandum 82-VII lists "Music" as a quasi-professional program. We believe that the intent of Council in so listing it was to monitor the introduction of performance-oriented Music programs. Programs in Music History or Musicology should, however, really be viewed as generally falling in the "core" Arts and Science area, as there are no performance courses or any substantial additional resources involved. The Committee, therefore, recommends that the Queen's program be treated as a "core" Arts and Science program and accordingly be eligible for funding.

(Excerpt from Letter dated February 6, 1984 from Professor R. Fraser, Acting-Chairman of the Academic Advisory Committee, to Mrs. M. Paikin, p. 1.)

Appendix B

Behavioural Neuroscience, B.Sc., Laurentian University
This program has been before the Committee since the fall of 1982. Other institutions within the system were canvassed as to their opinion concerning the program and then Laurentian responded to their comments. After a detailed review of all the relevant documentation, the Committee concluded that the program was not truly "quasi- professional", but rather, given the curriculum, more accurately described as a core Arts and Science program. The Committee was also concerned with the fact that the original program title "Neuroscience" did not accurately reflect the contents of the curriculum and so could mislead certain applicants and raise their expectations with respect to how professionally qualified they would be upon completion of the program and hence how "marketable" they would be with respect to employment opportunities and the prospects for graduate level study. Laurentian was asked to reconsider the program title and eventually accepted the Committee's recommendations that the program be retitled "Behavioural Neuroscience". The Laurentian Senate formally endorsed the change in title on September 22, 1983.

After further review, the Committee remains of the opinion that the program should not be regarded as a quasi-professional program and accordingly should be funded automatically.

(Excerpt from Letter dated February 6, 1984 from Professor R. Fraser, Acting-Chairman of the Academic Advisory Committee, to Mrs. M. Paikin, p. 2.)

83-XI Graduate Program Funding – Physical Therapy (MCISc), University of Western Ontario; Health and Radiation Physics (MSc), McMaster University; Music Criticism (MA), McMaster University; Music (MFA), York University; Physiological Optics (PhD), University of Waterloo

On October 15, 1982, the Council of Ontario Universities (COU) advised Council that 22 new graduate programs had been successfully appraised. COU offered no other commentary or information on the programs, and, therefore, it was left to each individual institution to request formally that a program be considered by Council for formula funding approval, and to supply Council with relevant information. In this memorandum Council offers advice on six new graduate programs.

Clinical Sciences in Physical Therapy (MCISc), University of Western Ontario
Council has considered the advice of its Academic Advisory Committee concerning the University of Western Ontario's new Master's in Clinical Sciences program in Physical Therapy.[1] This program meets all of Council's funding criteria for new programs submitted during the first graduate planning quinquennium and is consistent with the aims, objectives and existing strengths of the University. Even in a time of general economic constraint this program should be deemed eligible for formula funding support.

Accordingly, Council *recommends to the Minister:*

OCUA 83-28
FUNDING FOR THE MASTER'S IN CLINICAL SCIENCES IN PHYSICAL THERAPY PROGRAM AT THE UNIVERSITY OF WESTERN ONTARIO FOR 1985-86

THAT the MCISc program in Clinical Sciences in Physical Therapy program be deemed eligible for formula support beginning in 1985-86, and that eligible enrolment, from 1984-85 on, be included in the moving average for the university.

Health and Radiation Physics (MSc), McMaster University
Council has reviewed the advice of its Academic Advisory Committee with respect to McMaster University's new master's program in Health and Radiation Physics.[2] Council finds that the program meets all of the required funding criteria for new graduate programs. It is also clearly consistent with the aims, objectives and existing strengths of the institution. Council feels that even in a time of general economic constraint this program should be deemed eligible for formula funding support.

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1 See Appendix A
2 See Appendix B

Accordingly, Council *recommends to the Minister:*

OCUA 83-29
FUNDING FOR THE MASTER'S PROGRAM IN HEALTH AND RADIATION PHYSICS AT McMASTER UNIVERSITY FOR 1985-86

THAT the MSc program in Health and Radiation Physics at McMaster University be deemed eligible for formula support beginning in 1985-86, and that eligible enrolment, from 1984-85 on, be included in the moving average for the university.

Music Criticism (MA), McMaster University

Council has reviewed the advice of its Academic Advisory Committee,[3] and is satisfied that this program meets all of Council's funding criteria. It also is consistent with McMaster's aims, objectives and existing strengths. Even in a time of general economic restraint, this is a program which should be deemed eligible for formula funding support.

Accordingly, Council *recommends to the Minister:*

OCUA 83-30
FUNDING FOR THE MASTER'S PROGRAM IN MUSIC CRITICISM AT McMASTER UNIVERSITY FOR 1985-86

THAT the MA program in Music Criticism at McMaster University be deemed eligible for formula support beginning in 1985-86, and that eligible enrolment, from 1984-85 on, be included in the moving average for the university.

Music (MFA), York University

Having reviewed the advice of its Academic Advisory Committed, Council is satisfied that York University's new graduate program in Music has met the required funding criteria and is consistent with York's aims, objectives and existing strengths. Even in a time of general economic constraint, this program should be deemed eligible for formula funding support.

Accordingly, Council *recommends to the Minister:*

OCUA 83-31
FUNDING FOR THE MASTER'S IN FINE ARTS PROGRAM IN MUSIC AT YORK UNIVERSITY FOR 1985-86

THAT the MFA program in Music at York University be deemed eligible for formula support beginning in 1985-86, and that eligible enrolment from 1984-85 on, be included in the moving average for the university.

Physiological Optics (PhD), University of Waterloo

Council has examined the advice of its Academic Advisory Committee with respect to the University of Waterloo's doctoral program in Physiological Optics.[4] The program meets all of the required funding criteria and is consistent with the aims, objectives and existing strengths of the University. Despite a climate of general economic restraint, this is a program which should be deemed eligible for formula funding support.

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3. See Appendix C.
4. See Appendix E.

Accordingly, Council *recommends to the Minister*:

OCUA 83-32
FUNDING FOR THE DOCTORAL PROGRAM IN PHYSIOLOGICAL OPTICS AT THE UNIVERSITY OF WATERLOO FOR 1985-86

THAT the PhD program in Physiological Optics at the University of Waterloo be deemed eligible for formula support beginning in 1985-86, and that eligible enrolment, from 1984-85 on, be included in the moving average for the university.

M. Paikin
Acting Chairman
February 17, 1984

Appendix A

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master of Clinical Sciences (M.Cl.Sc.) in Physical Therapy, University of Western Ontario – New Graduate Program considered for Formula Funding

On March 22, 1983, the University of Western Ontario formally requested that Council consider recommending its Master of Clinical Sciences program in Physical Therapy for formula funding support. According to established procedures, the program was automatically referred to Council's Academic Advisory Committee.

The Committee considered the program on two occasions and examined it in light of Council's funding criteria for new graduate programs. The Committee also reviewed whether the program was consistent with the "aims, objectives and existing strengths" of the University. The Committee's findings with regard to the program are summarized below:

1. NEED

The need for this program can be established on several grounds. With regard to student demand, there are five applications for each position available in the program. Each graduating student has so far received on average three teaching offers. At present, 70% of instructors in Physical Therapy across Canada do not possess graduate degrees.

Both the Ontario Physiotherapy Association and the Canadian Physiotherapy Association were asked to comment on the Western program. The Ontario Group stated that "the continued development of a research base in physical therapy is essential for future development within the health care system." The Canadian Association commented that:

> The Canadian Physiotherapy Association recognizes that physiotherapists are in a unique position to contribute to the development of the body of knowledge which supports the practice of rehabilitation. The Association also recognizes that to fulfill this role, physiotherapists must have opportunities to acquire advance knowledge in the basic sciences and to develop clinical research skills. At the present time, such opportunities are not readily available to the two and a half thousand physiotherapists in Ontario. Physiotherapists from this province who wish to pursue graduate studies must either compete for a very limited number of places in the two established programs, located in Alberta and Quebec, or they must enter a graduate program that is peripheral to their area of expertise.

2. UNIQUENESS

The Committee is satisfied that this is indeed a unique program. No other existing Health Science program in Ontario is designed specifically to meet the needs for advanced education for qualified physiotherapists.

3. APPRAISAL

The Committee accepts that the program has passed a rigorous academic appraisal.

4. ENROLMENT

In 1982-83, there were seven full-time and two part-time students enrolled. Council's enrolment criterion has, therefore, been satisfied.

5. AIMS, OBJECTIVES, STRENGTHS

The University of Western Ontario has a strong undergraduate program in Physical Therapy and recognized collateral strengths in the Faculty of Medicine and the departments of Physiology, Anatomy, Clinical Neurological Sciences, Physical Medicine and Rehabilitation and Biophysics. There are various cross-appointments of teaching staff from these departments as well as some sharing of facilities. Also housed within the Physical Therapy Program is the Elborn College Clinic, a therapeutic treatment facility, which is a satellite of University Hospital. This new facility will improve the environment for clinical research within the program.

The Committee also notes that at a November 1982 meeting of the heads of Ontario Physical Therapy and Occupational Therapy Schools no other university indicated an intention in the foreseeable future to mount a program such as Western's.

6. FUNDING

The Committee, therefore recommends that:

> the University of Western Ontario's new M.Cl.Sc. program in Physical Therapy should be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
September 27, 1983

Appendix B

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master of Science Program in Health and Radiation Physics (M.Sc.)
McMaster University – New Graduate Program considered for Formula Funding

On October 15, 1982, Council was advised by the Council of Ontario Universities that McMaster University's M.Sc. Programme in Health and Radiation Physics had successfully passed academic appraisal. On March 8, 1983, McMaster University formally requested consideration of formula funding approval by Council, which subsequently referred the program to its Academic Advisory Committee.

The Academic Advisory Committee met on three separate occasions to consider the McMaster University M.Sc. program in Health and Radiation Physics and, as mandated by its "Terms of Reference" (October 20, 1981), considered the program in light of Council's funding criteria for new graduate programs (Advisory Memorandum 77-VII). In doing so it reviewed various related documents, including:

- calendar descriptions of the program.
- OCGS's Advisory Committee on Academic Planning's (ACAP) 1974 Discipline Assessment of Physics and Astronomy.
- McMaster University's *Statement of Programmes Recommended for Funding: M.Sc. Programme in Health and Radiation Physics*, March 8, 1983.
- OCUA Advisory Memorandum 81-VII.

The Committee carefully applied each of Council's four funding criteria and addressed the questions of whether the program was consistent with the "aims, objectives and existing strengths" of the university. The Committee's findings are summarized below.

1. NEED

The Committee is satisfied that a need exists for this program in Ontario and Canada. There are concrete employment opportunities for graduates of a program concerning health and radiation physics:

> In Canada there is a growing need in government monitoring laboratories, in nuclear energy corporations, in mining and extractive metallurgy of radioactive ores, in industrial and medical x-ray and other radiation monitoring services...Past needs in Canada have been met partly by acquiring personnel from abroad and...enrolling employees in retraining programmes offered in the United States."[1]

2. UNIQUENESS

The Committee is satisfied that no similar program in the field exists in Canada. It appears that no certification procedure exists for professional physicists at this time, neither is there a graduate programme in Canada in Health and Radiation Physics.

3. APPRAISAL

The Committee is satisfied that the program has passed a rigorous academic appraisal.

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1 *Statement on Programmes Recommended for Funding: M.Sc. Programme in Health & Radiation Physics*, McMaster University, March 8, 1982, p. 2.

4. ENROLMENT
Enrolment in the program in 1982/23 comprised 2 PT students. There are currently 3 FT and 2 PT students enrolled for 1983/84.

5. AIMS, OBJECTIVES, STRENGTHS
The high quality of McMaster University's Physics Department was noted in 1974 by ACAP in its Discipline Assessment Report:

> McMaster University has an excellent physics department which has achieved international recognition in its two areas of specialization, nuclear physics and solid state physics.[2]

The Committee is satisfied that the program in Health and Radiation Physics is consistent with the aims, objectives and existing strengths of McMaster University.

6. FUNDING
The Committee, therefore, recommends to Council that:

> McMaster University's new M.Sc. program in Health and Radiation Physics should be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
September 27, 1983

2 OCGS Advisory Committee on Academic Planning, *Perspectives and Plans for Graduate Studies, Physics and Astronomy*, 1974, p. A-29.

Appendix C

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master's in Music Criticism (M.A.), McMaster University – New Graduate Program considered for Formula Funding

On March 8, 1983, McMaster University formally requested that Council consider recommending its M.A. program in Music Criticism for formula funding. According to established procedures, the program was automatically referred to Council's Academic Advisory Committee.

The Committee considered the program on two occasions, examining it in light of Council's funding criteria for new graduate programs and addressing the question of whether the program was consistent with the "aims, objectives and existing strengths" of the university. The Committee's findings are summarized below.

1. NEED

Comments made by the Task Force established by the Advisory Committee on Academic Planning (ACAP) to review Graduate Programs in Music (1974) indicated that:

> A great deal of musical criticism is written and published, but a need for higher standards is regularly voiced. If a thriving musical culture is demonstrated by a range of critical outlets from the daily press through magazines and scholarly journals to research monographs, then Canada is not at that stage yet, although efforts in the fields of aesthetics, musicology, and journalism indicate a swift and increasingly serious development towards it, in which, again, the university music departments play a central role.[1]

The Committee also found that graduates of the program may expect to find employment opportunities existing, for example, in the fields of journalism and teaching, and in the radio and television industry.

The Committee is satisfied that a need for such a program exists in Ontario and Canada.

2. UNIQUENESS

The Committee is satisfied that McMaster University's M.A. program in Music Criticism is unique and that no other program specializing in this field exists.

3. APPRAISAL

The Committee is satisfied that the program has passed a rigorous academic appraisal.

4. ENROLMENT

In 1981/82 six full-time students and one part-time student were enrolled in the program. Council's enrolment criterion is, therefore, satisfied.

5. AIMS, OBJECTIVES AND STRENGTHS

McMaster University has a strong music department. Its music criticism program is assisted by the departments of Philosophy and Psychology and several music

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1 *ACAP Discipline Assessment Report, 1974/76*, p. E-13

faculty members are professional writers and reviewers. In addition the university has excellent library resources in its music section and has established its own concert series.

6. FUNDING

The Committee, therefore, recommends that:

> McMaster University's M.A. in Music Criticism should be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
October 25, 1983.

Appendix D

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS
ACADEMIC ADVISORY COMMITTEE

Master of Fine Arts in Music (M.F.A.), York University – New Graduate Program considered for Formula Funding

On March 9th, 1983, York University formally requested that Council consider recommending its M.F.A. program in Music for formula funding support. According to established procedures, the program was automatically referred to Council's Academic Advisory Committee.

The Committee considered the program on two occasions, examining it in light of Council's funding criteria for new graduate programs and addressing the question of whether the program was consistent with the "aims, objectives and existing strengths" of the university. The Committee's findings are summarized below.

1. NEED

In assessing the need for the type of program proposed at York University, the Committee noted the absence of any other M.F.A. program in Music specializing in ethnomusicology and Canadian music, and acknowledged the advice given by COU's Advisory Committee on Academic Planning (ACAP) that:

> There is an urgent need to develop strong graduate programmes in these two areas. These programmes are necessary to heighten awareness, knowledge and understanding of the musical contribution of the native peoples, the immigrant ethnic communities and the two founding cultures of Canada. Little is being done in these areas in the existing graduate programmes which specialize in historical musicology.[1]

Graduates of the program will find employment opportunities in secondary and post-secondary institutions, libraries, archives, and in the communications media and the performing arts.

The Committee is satisfied that a need exists for York University's M.F.A. in Fine Arts.

2. UNIQUENESS

The Committee is satisfied that this is indeed a unique program and that no other specializing in ethnomusicology exists in Ontario and Canada.

3. APPRAISAL

The Committee is satisfied that the program has passed a rigorous, academic program.

4. ENROLMENT

In 1981/82 eleven full-time students and one part-time student were enrolled in the program. Council's enrolment criterion is, therefore, satisfied.

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1. *ACAP Discipline Assessment Report, 1974/76*, p. 14.

5. AIMS, OBJECTIVES AND STRENGTHS

The Committee acknowledges that York University has a strong base on which to mount its program,

> The research interests of the faculty appear to be shifting towards a Canadian context. The necessary interdisciplinary contacts are available at York. These include anthropology, psychology, sociology, linguistics and area studies programmes. The location of York...provides excellent opportunities for field research of immigrant communities.[2]

6. FUNDING

The Committee, therefore, recommends that:

> York University's M.F.A. program in Music should be recommended as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
October 26, 1983.

2. *Ibid.*, p. 15.

Appendix E

ONTARIO COUNCIL ON UNIVERSITY AFFAIRS ACADEMIC ADVISORY COMMITTEE

Doctoral Program in Physiological Optics (Ph.D.), University of Waterloo – New Graduate Program considered for Formula Funding

On June 28, 1983, the University of Waterloo requested that Council consider recommending for formula funding its new doctoral program in Physiological Optics. Council referred this request to the Academic Advisory Committee for advice.

In accordance with its "Terms of Reference", the Committee examined the program in light of Council's funding criteria for new graduate programs. The Committee also considered the matter of institutional appropriateness. The Committee's findings are summarized below:

1. NEED

There is a general societal need for teachers and researchers who can train students in the area of preventive eyecare. Much fundamental research is still required in order to explore thoroughly the epidemiology of vision defects. Additional faculty will be needed in the future to teach in the undergraduate and graduate optometry programs at Waterloo. Waterloo estimates that two doctoral student graduates per year will be needed to "meet teaching and research needs in the two existing Canadian Schools of Optometry".[1]

2. UNIQUENESS

Waterloo has the only English-language School of Optometry in Canada and no doctoral program similar to Waterloo's exists at present in Canada.

3. APPRAISAL

The Committee is satisfied that the program passed a rigorous academic appraisal, at which time it did not require improvements.

4. ENROLMENT

As students began enrolling in the program in September 1981 Council's enrolment criterion has been met. The Committee notes that there are currently two full-time students enrolled in the program and one other student pursuing a joint Biology-Physiological Optics degree. The planned original enrolment was to have no more than five students. The current enrolment level appears to be consistent with that aim, but nevertheless the future enrolment levels in this program should be carefully monitored.

5. AIMS, OBJECTIVES AND STRENGTHS

In 1967, the forty-two year old Ontario College of Optometry was integrated into the Faculty of Science at Waterloo, and Waterloo began offering an undergraduate program in Optometry. In 1972, a master's program was launched. There is, therefore, an established base of resources for Optometry research and teaching at Waterloo. And as Waterloo noted in its program approval submission:

1. Letter from Dean H.H.E. Leipholz to Dr. B.C. Mathews, November 7, 1983.

> The School of Optometry is exceptionally well equipped for all areas of study of Physiological Optics. The School of Optometry clinical programmes are well adapted to yield essential information, particularly for epidemiological, demographic and other field studies. Models of vision care delivery systems to geriatric, mentally retarded, pediatric and other special segments of society are currently in progress. There are supporting laboratories and computer facilities for all areas of study within the scope of the programme.[2]

The Committee is satisfied that the program is consistent with Waterloo's established aims and objectives and with its existing academic strengths.

6. FUNDING

The Committee, therefore, recommends to Council that:

> the doctoral program in Physiological Optics at the University of Waterloo be recommended by Council as being eligible for formula funding support.

ACADEMIC ADVISORY COMMITTEE
February 6, 1984

2. Attachment to letter from Dr. L.A.K. Watt to Dr. B.C. Matthews, June 28, 1983, p. 4.

OCUA Public Meetings 1983–84

OCUA Public Meetings 1983–84

Date	Location of Meeting, and Institutions or Organizations
April 7, 1983	**Queen's Park**
	University of Waterloo
April 8, 1983	**Queen's Park**
	Council of Ontario Universities Ontario Confederation of University Faculty Associations Confederation of University Staff Associations Ontario Federation of Students
April 15, 1983	**Brock University**
	Brock University University of Guelph McMaster University University of Toronto
April 29, 1983	**University of Windsor**
	University of Windsor University of Western Ontario Wilfrid Laurier University
May 6, 1983	**Queen's University**
	Queen's University Carleton University Trent University Ottawa University
May 18, 1983	**Queen's Park**
	Ontario Graduate Association
May 19, 1983	**Ryerson Polytechnical Institute**
	Ryerson Polytechnical Institute Ontario Institute for Studies in Education York University Ontario College of Art
June 24, 1983	**Laurentian University**
	Laurentian University Algoma University College Nipissing University College Le Collège Universitaire de Hearst

OCUA Recommendations and Government Responses, 1983-84

OCUA Recommendations and Government Responses, 1983-84

Recommendations Number	Title	Response
Advisory Memorandum 83-I		
83-1	Funding of Undergraduate Quasi-Professional Programs beginning in 1984-85.	Partially Accepted (see Minister's letter of June 3, 1983, which follows this table)
Advisory Memorandum 83-II		
83-2	Funding for the Master's Program in Language and Learning Problems at York University beginning in 1984-85.	Accepted
83-3	Funding for the Doctoral Program in Management at Queen's University Beginning in 1984-85.	Accepted
Advisory Memorandum 83-III		
83-4	Ontario Graduate Scholarship Program Eligibility.	Accepted
83-5	Ontario Graduate Scholarship Stipends 1984-85	Not Accepted
83-6	Institutional Awards to Universities without Doctoral Programs.	Accepted
83-7	Ontario Graduate Scholarships to Persons on Student Visas.	Accepted
83-8	Number of Ontario Graduate Scholarship Awards in 1984-85.	Accepted
Advisory Memorandum 83-IV		
83-9	Government Operating Grants for 1984-85 to Meet the Costs of Council's Basic Objectives in Funding Provincially-assisted Universities and their Affiliated Colleges, Ryerson Polytechnical Institute, The Ontario Institute for Studies in Education, The Ontario College of Art and Dominican College.	Not Accepted
83-10	Formula Fee Rates for 1984-85 to Meet the Costs of Council's Basic Objectives.	Not Accepted
83-11	Funding for 1984-85 for the Bar Admission Course.	Not Accepted
83-12	Additional Funding for 1984-85 for existing Bilingualism Programs.	Accepted
83-13	Equipment and Library Funding for 1984-85.	Not Accepted
83-14	Level of Support for Major Repairs, Renovations and Replacement Projects in 1984-85.	Not Accepted

Advisory Memorandum 83-IVA		
83-9A	Government Operating Grants for 1984-85 to Meet the Cost of Council's Basic Objectives in Funding Provincially-assisted Universities and their affiliated Colleges, Ryerson Polytechnical Institute, The Ontario Institute for Studies in Education, The Ontario College of Art and Dominican College.	Not Accepted
83-10A	Formula Fee Rates for 1984-85 to Meet the Costs of Council's Basic Objectives.	Not Accepted
Advisory Memorandum 83-V		
83-15	Funding for a New Public Administration Degree Program at Ryerson Polytechnical Institute for 1984-85.	Accepted
Advisory Memorandum 83-VI		
83-16	Post-residency Fees	Accepted
Advisory Memorandum 83-VII		
83-17	Differential Fees for Visa Graduate Students.	Accepted
83-18	Assistance for Visa Graduate Students.	Not Accepted
Advisory Memorandum 83-VIII		
83-19	Interim Funding Criteria for new Graduate Programs commencing May 1, 1984.	Accepted
83-20	Interim Funding Criteria for Existing Graduate Programs commencing May 1, 1984.	Accepted
Advisory Memorandum 83-IX		
83-21	Differentiation Grant for Trent University 1984-85.	Accepted
83-22	Northern Ontario Grants 1984-85.	Accepted
83-23	Bilingualism Grants 1984-85.	Accepted
83-24	Grant to the Law Society of Upper Canada on behalf of the Bar Admission Course 1984-85.	Accepted
83-25	Graduate and Undergraduate BIU Values under the Current Formula for 1984-85.	Accepted
83-26	Base and Moving Average BIU Values under the new Formula for 1984-85.	Accepted
Advisory Memorandum 83-X		
83-27	Funding for the Honours Bachelor's Program in Mathematics for Commerce at York University beginning in 1985-86.	Accepted
Advisory Memorandum 83-XI		
83-28	Funding for the Master's in Clinical Sciences in Physical Therapy Program at the University of Western Ontario for 1985-86.	Accepted
83-29	Funding for the Master's Program in Health and Radiation Physics at McMaster University for 1985-86.	Accepted
83-30	Funding for the Master's Program in Music Criticism at McMaster University for 1985-86.	Accepted
83-31	Funding for the Master's in Fine Arts Program in Music at York University for 1985-86.	Accepted
83-32	Funding for the Doctoral Program in Physiological Optics at the University of Waterloo for 1985-86.	Not Accepted

Response to Advisory Memorandum 83-XII

Office of the Minister

Ministry of Education
Ministry of Colleges and Universities

Mowat Block
Queen's Park
Toronto, Ontario
M7A 1L2
416/965-5277

June 3,1983

Dr. B.C. Matthews
Chairman
Ontario Council on University Affairs
7th Floor
700 Bay Street
Toronto, Ontario
M5G 1Z6

Dear Dr. Matthews:

Further to my letter of April 12, 1983, I am pleased to approve, in part, OCUA Advisory Memorandum 83-I, FUNDING OF UNDERGRADUATE QUASI-PROFESSIONAL PROGRAMS BEGINNING IN 1984–85; specifically that the following programs be deemed eligible for formula support beginning in 1984–85 and that eligible enrolment therein be included from 1983–84 on, in the moving average for each institution:

Program	University
Music (B.A.)	Laurentian
Commerce and Economics (B.A.)	McMaster
Pre-Service Teacher Education, Anglophone Sector, (B.Ed.)	Ottawa

The recommended certificate programs in Community Recreation and Recreation Resource Management (University of Ottawa) are referred back to Council with the request that Council review the policy of funding such programs outside of the colleges of applied arts and technology which have a specific mandate to provide programs at this level. If funding is considered appropriate, a clear rationale for the support of certificate programs at the university level and at Ryerson Polytechnical Institute should be identified.

Yours truly,

Bette Stephenson, M.D.
Minister